

How To Guide
SAP Business One and SAP Business One, Version for SAP HANA
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PUBLIC

How to Work with Configurable UI Templates

SAP Business One 9.3 and SAP Business One 9.3, Version for SAP HANA



Typographic Conventions

Type Style	Description
Example	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER .

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1 Introduction

Note

This document applies to SAP Business One 9.3, and SAP Business One 9.3, version for SAP HANA. All occurrences of “SAP Business One” in this document refer to both versions of the application.

SAP Business One application forms include multiple fields, tabs, and options to support the various business needs of the company. Not all the options are used by all the businesses, and often, companies add user defined fields and make other customizations to the SAP Business One application, tailoring it to the size of the business.

The [Configurable UI Template](#) takes the customization a big step further. It enables you to adjust the user interface of the most commonly used forms in the application, tailoring them to your business and its various users.

Using the [Configurable UI Template](#), you can:

- Hide, disable, and move selected fields and tabs in forms
- Incorporate user defined fields seamlessly in a given form
- Set a default UI template or assign multiple UI templates to each user
- Copy UI templates from one company to another by using Quick Copy

2 Working with UI Configuration Templates

2.1 Creating a UI Configuration Template

1. From the SAP Business One [Main Menu](#), choose [Administration](#) → [Utilities](#) → [UI Configuration Template](#). Switch to Add mode by pressing `CTRL+A` or choosing the option [Add](#) from the [Data](#) menu in the menu bar.
2. In the [Name](#) field, enter a unique name for the template. In the [Description](#) field, enter a meaningful description.
3. On the [Forms](#) tab, click the dropdown menu in the [Forms](#) list and select the form you would like to customize. You can include a single or multiple forms in each template.
4. Choose [Add](#).

2.2 Configuring the User Interface of a Selected Form

You can make the following adjustments in every application form that appears in the [Forms](#) list in the [UI Configuration Template](#):

- Hide fields or tabs
- Disable fields
- Move fields and user-defined fields

The following working methods provide you great flexibility. Combining them lets you apply all the changes mentioned above as follows:

- Directly in the form – select the relevant UI elements in the selected form and apply any required change by using the options available in the context menu and/or the drag and drop technique.
- Form Settings – the [Form Settings](#) window is enhanced, enabling you to hide and disable tabs and fields.

2.2.1 Making Changes Directly in a Form

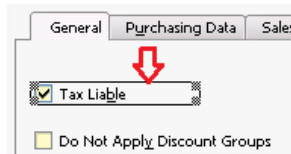
Using this technique, you can make the following changes:

- Hide and disable selected fields
- Move selected fields, including user-defined fields, from one area to another
- Align selected fields vertically and horizontally


Procedure

1. From the SAP Business One [Main Menu](#), choose [Administration](#) → [Utilities](#) → [UI Configuration Template](#).
2. In the [UI Configuration Template](#) window, select the relevant template. The list of the forms included in the selected template appears on the [Forms](#) tab.

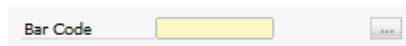
- Select the desired form by clicking its row number cell, and choose [Edit Form UI](#).
The selected form appears, with the label “UI Edit Mode” added to the form name.
- To make changes, first select the required UI element or elements. Once you select an element, its borders are marked by a thin black line:



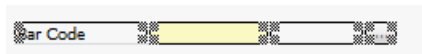
When you select a UI element, all UI elements that are related to it are selected as well, and together they are considered as one unit:

 Example



If you select the [Bar Code](#) field in the [Item Master Data](#) form:

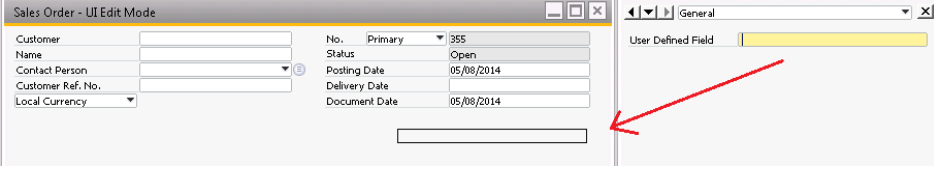
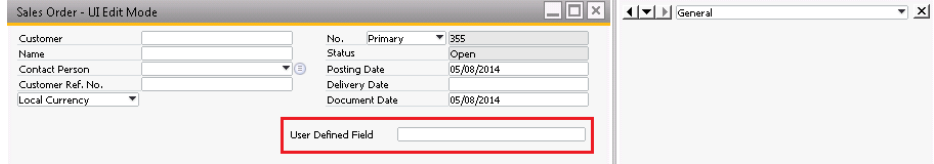



The following UI elements are selected as well, and are considered as one unit:



- You can apply the following changes to the selected UI element or elements:

Type of Change	How to Do
Hide	From the context menu, choose the option Hide .
Disable	From the context menu, choose the option Disable . The selected UI elements are set to “read-only” mode and cannot be changed. For example, the  (Browse) button next to the Bar Code field is disabled as well: 
Move UI elements from one area to another	You can move selected UI elements from the form header to one of the tabs, or to the lower area of the form (relevant in sales and purchasing documents); from one tab to another; or from a given tab to the header area. Click and hold the desired UI elements, and then drag and drop them to the desired location. To move UI elements from one tab to another: <ol style="list-style-type: none"> Drag the selected UI elements from their original location (tab) to the header area of the form. Select the tab to which you want to move the UI elements. Drag the selected UI elements from the header area of the form to the destination tab.

Type of Change	How to Do
Align	<p>You can align multiple UI elements vertically and horizontally. This can help to create a clean and consistent layout for the different UI elements on the form.</p> <p>To align a group of UI elements to the left or the right, select the relevant UI elements using the CTRL function. From the context menu, choose Align → Left or Right.</p> <p>To align selected UI elements to the top or bottom of a certain area, select the required UI elements, and from the context menu, choose: Align → Top or Bottom.</p>
Move UDF to Main Form	<p>You can move user defined fields to the main application form, either to the header area or the tabs. To do so, click the editable part of a user defined field and drag it to the desired area:</p>  <p>The selected field is moved to the header area:</p> 

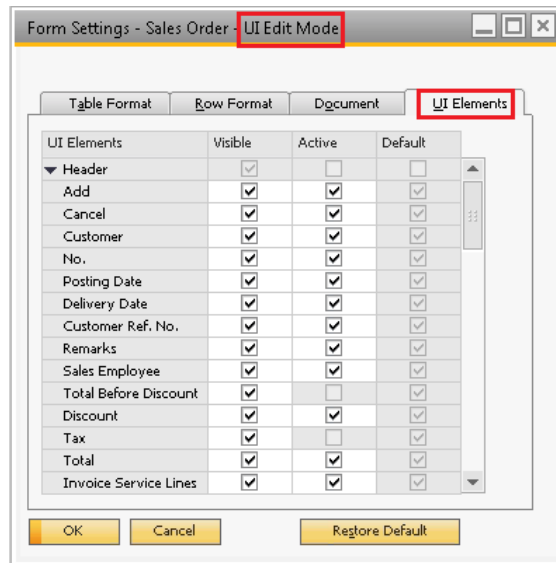
- To save your changes, right-click in an empty area of the form you have just configured, and choose **Save**.
- To leave the **UI Edit Mode**, close the form using the  icon.

2.2.2 Hiding and Disabling UI Elements Using Form Settings

The option to open the **Form Settings** window has been added to Item Master Data, Business Partner Master Data, and Chart of Accounts. For configurable forms, such as marketing documents, incoming and outgoing payments, or journal entry, the existing **Form Settings** window has been enhanced to enable hiding and disabling of selected UI elements.

Procedure

- Open the desired form in UI Edit Mode. Click the  (**Form Settings**) icon in the toolbar. The **Form Settings** window opens in UI Edit Mode:



2. The **UI Elements** tab lists all the UI elements available in the given form, together with the following columns:
- **Visible** – indicates whether the element is visible in the form or not
 - **Active** – indicates whether the element is active or in read-only mode
 - **Default** – indicates whether the settings in the **Visible** and **Active** columns are the default settings for the UI element

The following table describes the UI configurations you may perform using this tab:

Type of Change	How to Do
Hide field	Deselect the checkbox of the relevant UI element in the Visible column. For UI elements that cannot be hidden, the Visible checkbox is greyed out and its status cannot be changed.
Hide Tab	You can hide all tabs in all configurable forms, except for the following: <ul style="list-style-type: none"> • General tab in Item Master Data and Business Partner Master Data • Contents tab in sales, purchasing, and inventory documents To hide a tab, deselect its checkbox on the UI Elements tab. After deselecting the checkbox, the tab disappears, and the remaining tabs are resized accordingly.
Disable UI Element	To set a certain UI element to read-only mode, keep the Visible checkbox selected, and deselect the Active checkbox. Once you deselect the Active checkbox, the given UI element becomes greyed out.

2.2.3 Copying Settings from One UI Template to Another

You can copy the UI configuration of one or multiple selected forms from one template to another. To do so, follow the steps below:

Procedure

1. From the SAP Business One [Main Menu](#) choose [Administration](#) → [Utilities](#) → [UI Configuration Template](#). The [UI Configuration Template](#) window appears.
2. From the [UI Template](#) list, select the UI template from which you want to copy the UI configuration. From the list of forms included in the template, click the row number cell to select a form whose configuration you want to copy.
You can press and hold `CTRL` or `Shift` to select multiple forms.
3. Choose [Copy To](#). The [Selection](#) window listing all the available target UI templates appears. Select the UI template to which you want to copy the UI configuration of the selected form, and choose [OK](#).
4. The UI configuration of the selected form is now added to the target UI template.



Caution

If you copy the UI configuration of a form which already exists in the target template, the UI configuration of the form in the target template will be overwritten.

2.3 Assigning UI Templates on Company Level and User Level

You can set a default UI template on a company level. This UI template is applied to all users. In addition, you can assign different UI templates to specific users or user groups.

2.3.1 Setting Default UI Templates for Company

To assign a default UI template to the company, follow the steps below.

Procedure

1. From the SAP Business One [Main Menu](#), choose [Administration](#) → [System Initialization](#) → [General Settings](#) → [Display](#) tab.
2. From the [Default UI Template](#) dropdown list, choose the UI template to be assigned to all users.
3. Choose [Update](#).

2.3.2 Assigning UI Templates to Users or User Groups

You can assign one or more UI templates to each user or user group. If multiple templates that include the same form are assigned to a given user or user group, the first template assigned to the user is considered as the default template for this user or user group.

All users can set their own default template for a given form. For more information, see [Personalizing UI Templates](#).

Note

You can assign UI templates to regular users only. Assigning UI templates to superusers is not possible.


Procedure

1. From the SAP Business One [Main Menu](#), choose [Administration](#) → [Utilities](#) → [UI Configuration Template](#). The [UI Configuration Template](#) window appears.
2. From the [UI Template](#) list, select the UI template you want to assign, and proceed as follows:
 - o To assign the UI template to one or multiple users, choose the [Assigned Users](#) tab.
 - o To assign the UI template to one or multiple user groups, choose the [Assigned Groups](#) tab.
3. Select the users or user groups to whom you want to assign the template and choose [Update](#).

2.4 Personalizing UI Templates

You can personalize UI templates assigned to you to better fit your preferences and work needs. To do so, follow the steps below.

Procedure

1. Open the application form you want to personalize and click the  ([Form Settings](#)) icon in the toolbar. The [Form Settings](#) window for the given form appears.
2. From the [Select UI Template](#) dropdown list, select the UI template to which you want to make changes, and make changes to the fields on the [Table Format](#) tab and the [Row Format](#) tab.

Note

Your default UI template is the one that was assigned to you first. You can set a different UI template as your default by selecting it in the [Select UI Template](#) dropdown list.

3. Choose [Apply](#) or [OK](#).

2.5 Copying UI Templates by Using Quick Copy

To copy UI templates from one company to another, follow the steps below.

Note

User-defined fields are not supported in this process. If you copy UI templates that include user-defined fields, the UI templates will be copied to the target company, but the user-defined fields will be omitted.

1. From SAP Business One [Main Menu](#), choose [Administration](#) → [System Initialization](#) → [Implementation Center](#) → [Implementation Tasks](#) → [Data Management](#) and click the [Copy Data Between Companies](#) icon.
2. Make all required settings in the [Quick Copy](#) window. Under the [Data Categories](#) section, click [Administration](#) → [Utilities](#) → [UI Configuration Template](#). The list of UI templates defined in the source company is displayed.
3. Select the checkboxes of the UI templates that you want to copy.

2.6 Deleting and Withdrawing a UI Template

You can delete a UI template and withdraw a UI template that has been assigned to users at any time. When a UI template is deleted or when a form is deleted from a UI template, all the personal settings made by users to whom the UI template was assigned are deleted as well.

2.6.1 Deleting a UI Template

1. From the SAP Business One [Main Menu](#), choose [Administration](#) → [Utilities](#) → [UI Configuration Template](#). The [UI Configuration Template](#) window appears.
2. From the [UI Template](#) list, select a UI template you want to delete and from the context menu choose [Delete Row](#).
3. A warning message appears stating the deletion is irreversible. To complete the deletion, choose [Yes](#).

2.6.2 Withdrawing an Assigned UI Template

1. From the SAP Business One [Main Menu](#), choose [Administration](#) → [Utilities](#) → [UI Configuration Template](#). The [UI Configuration Template](#) window appears.
2. From the [UI Template](#) list, select a UI template you want to withdraw and proceed as follows:
 - o If it's assigned to users, choose the [Assigned Users](#) tab.
 - o If it's assigned to user groups, choose the [Assigned Groups](#) tab.
3. On the [Assigned Users](#) tab or the [Assigned Groups](#) tab, deselect the users or user groups from whom you want to withdraw the template. A warning message appears stating that all personal settings made by these users to the UI template will be deleted. To complete the withdrawal, choose [Yes](#).

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