



INNORMAX

**SAP Business One v10 –
How to start using
Web Client**

619-241-4100

team@innormax.com



**SAP[®] Business
ByDesign[™]**

www.innormax.com

Table of Contents

1. Introduction
2. Access and Login
3. Home Page Structure
4. My Home
5. Main Menu
6. Me Area
 - 6.1 App Finder
 - 6.2 Settings
 - 6.2.1 Appearance
 - 6.2.2 Home Page
 - 6.2.3 Language and Region
 - 6.2.4 User Activities
 - 6.2.5 Notifications
 - 6.3 General Setting
 - 6.3.1 Editing the Home Page
 - 6.3.2 Recent Activity and Frequently Used
7. Enterprise Search
8. Notification Center

Introduction

One of the main innovations that the new version of SAP Business One 10 has brought is a new Web Client. The Web client makes access to the platform much easier. By not depending on the local client, it is accessible from any device. It works like an app, without actually being one. It suppresses any type of installation since it works directly in the main browsers on the market. Something that greatly enhances the portability of the system and allows you to take advantage of it from all types of devices, fixed or mobile.

It is important to note that the use of the Web Client is complementary to the traditional desktop application. It does not imply the acquisition of additional licenses, so any user with a standard license can access it at any time and from anywhere.

With the Web Client you can:

- Create, process, and update marketing documents and master data
- Create and track activities
- Create and manage document drafts including approval processes
- Benefit from sophisticated analytical charting capabilities and predefined analytics content
- Utilize user-defined fields, tables, and objects

Access and Login

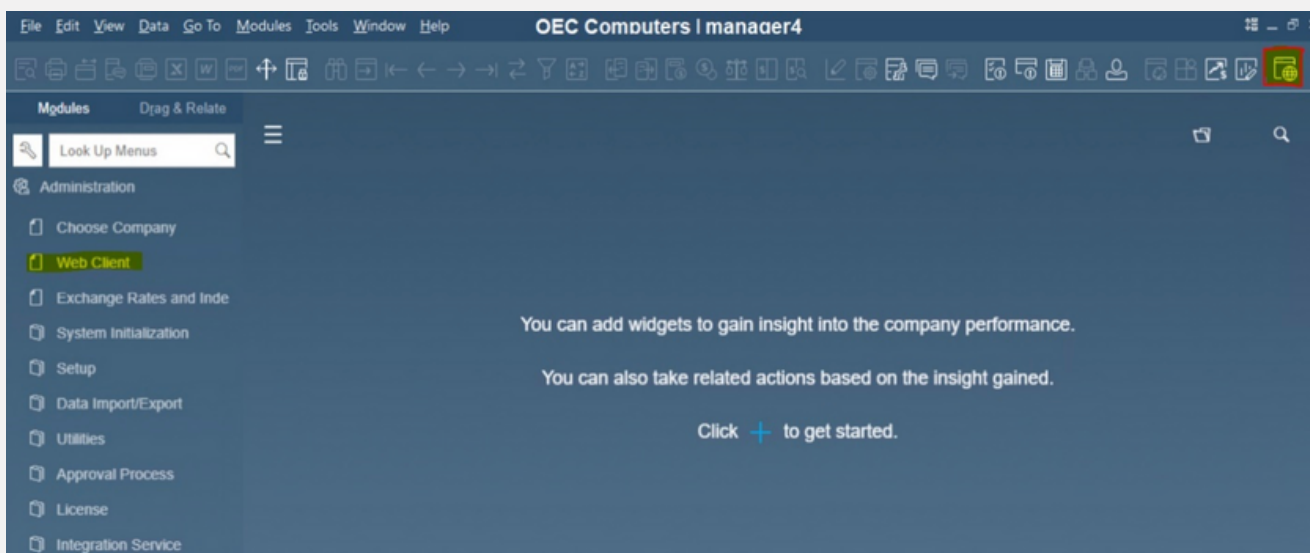
Access Web Client from within SAP Business One by choosing the Web Client option under the **Administration module** in the Main Menu, or by clicking the Web Client icon on the toolbar.

Alternatively, click the URL provided to you by your SAP Business One partner.

For an optimized user experience, launch Web Client in either a desktop computer or tablet, using one of the following Web browsers:

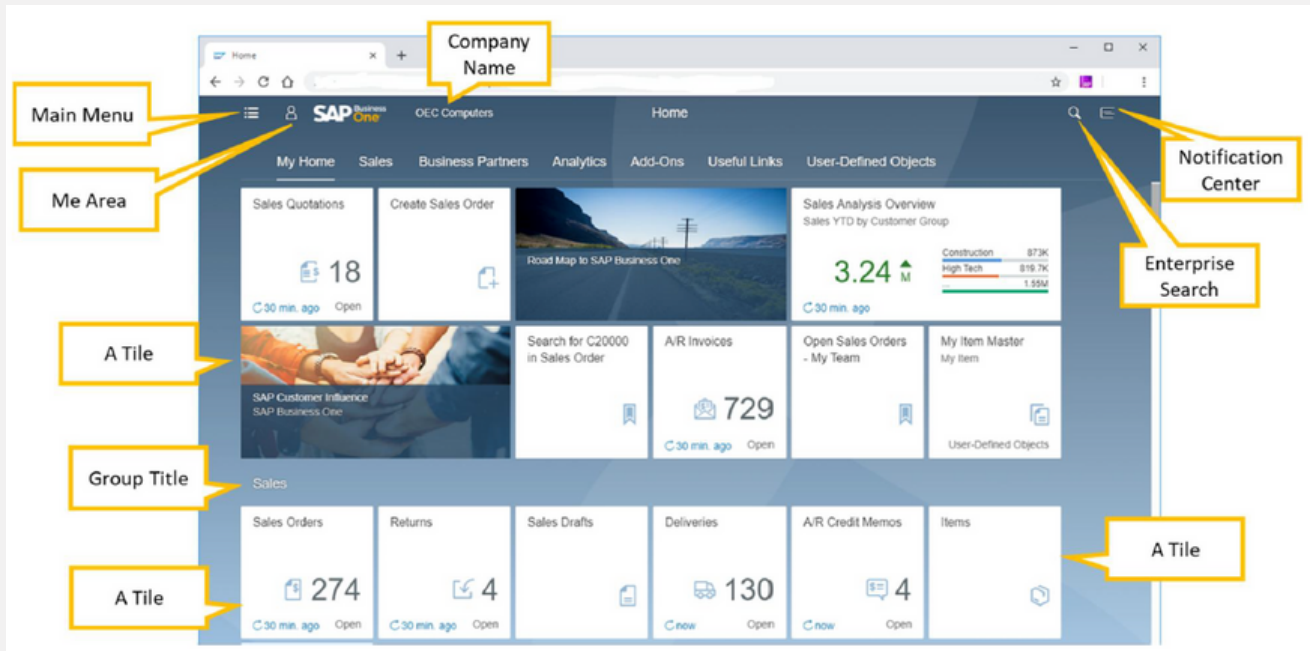
- Google Chrome
- Mozilla Firefox
- Apple Safari (Mac and iPad)

In the login screen, choose your company database and enter your SAP Business One username and password. You can log in to SAP Business One and to Web Client in parallel.



Home Page Structure

The home page appears after login, introducing the following elements:



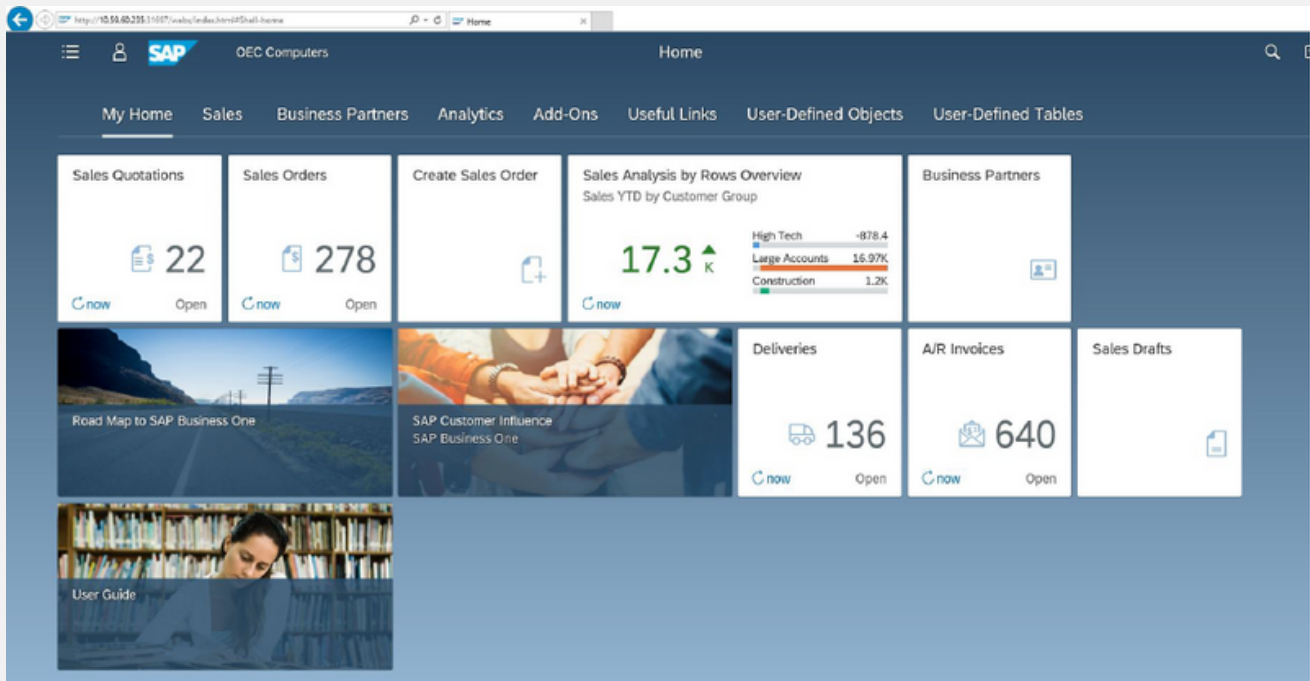
My Home

This is the first category that appears in the home page and is the first entry in the Main Menu. The tiles in the screen and sequence list below are the default tiles of My Home; however, the appearance of any individual tile depends on your authorizations.

For example, if you have read-only authorization for Sales Orders, the Create Sales Order tile will not appear. If your authorizations change, the appropriate tiles will appear at the next login.

Sequence of default tiles:

- Sales Quotations
- Sales Orders
- Create Sales Order
- Sales Analysis Overview
- Business Partners
- Roadmap to SAP Business One
- Deliveries
- A/R Invoices
- Sales Drafts
- User Guide




You can add other tiles as needed; for example, the SAP Customer Influence tile, which also appears in the screen, is not a default tile. Any customizations that you make will be preserved.

Main Menu

Click this icon  to open the main menu.



- A menu with a structure similar to the SAP Business One **Main Menu** appears on the left side of the screen.
- The structure of the menu reflects the default sequence of tiles in the home page.
- The search box enables you to enter a search term and find the relevant entry in the menu.
- To hide the menu, click the menu icon again.

Me Area

The **Me Area** lets you personalize and customize Web Client for your convenience. Click this icon  to open the Me Area. The following options are available:

6.1 App Finder


Click this icon  to open a catalog of all available apps.

- Here you can add more apps (tiles) to your home page and remove the irrelevant ones.
- You can either review the whole list or focus on a specific group (click **All** or click the group name, respectively, in the left panel).
- The apps marked with the highlighted blue pin  are already on your home page; click the pin  to edit the app location, or to remove the app.

In the following screen, the current group of an app is selected.

- To add the app to additional groups, select these groups.
- To remove the app from your home page, deselect the current group(s).
- To move the app to another group, select the required group and deselect the current one.
- To assign the app to a new group, click the option **New Group**. Enter a name for the new group and click OK. The new group is added to the navigation bar, displaying the assigned app.

Similar options are available for apps that are not included yet in your home page.

To view the home page after your changes, click the **Home** icon  next to the SAP Business One logo.

6.2 Settings

Click this icon  to open the Settings area, where you can view and set personal preferences.

6.2.1 Appearance

In the THEME section, you can choose the user interface theme for Web Client. By default, **SAP Belize Deep** is selected. For high-contrast user interface, choose **SAP Belize HCB**.

In the DISPLAY SETTINGS section, you can choose your preferred spacing and animation options.

Click Save to apply your choices.

6.2.2 Home Page

Here you can set whether to display the tiles of all groups (by default) - with this option, the group names in the navigation bar serve as anchors - or to display one group of tiles at a time. The selected option also affects the navigation within detailed view pages:

- **Show all content** - the whole record is displayed so you can scroll up/down or use the tabs as anchors to the required section in the detailed view page.
- **Show one group at a time** - the content of the header and current tab are displayed. To view content of other tabs, click the relevant tab; the data is refreshed accordingly.

6.2.3 Language and Region

Here you can change the display language of Web Client. Note that by default, the display language of Web Client is identical to the display language in SAP Business One. Choosing a different language in Web Client affects the display language in SAP Business One and vice versa.

6.2.4 User Activities

For your convenience, Web Client maintains a dynamic list of the 30 recent functions you have used, and the 30 functions you use most frequently. The two lists are available in the **Me Area**. The setting in this section allows you to turn off this function. In addition, you can clear your usage history in Web Client by choosing the **Clear** button, thereby emptying these lists.

6.2.5 Notifications

The Notifications Center on the right-hand side lists notifications for activities. The settings in this section allow you to:

- Show notification previews on the home page.
- Decide whether to pop up activity reminders; applies only to the activities where reminders are set.
- Define the number of days for which notifications should be displayed; by default, 30 days are defined.

6.3 General Settings

Here you can turn on/off the appearance of the **Quick View** when clicking the golden arrow; by default, this switch is set to On.

6.3.1 Editing the Home Page

Click the pencil icon to customize the home page according to your preferences; the icon is available only when the home page is displayed.

- Click **Add Group** to create a new group.

- Click the “+” icon on an empty tile to open the **App Finder** and add more tiles to your home page.
- You can **Hide** or **Delete** the group, as well as Save your changes.
- Click the **X** in the upper-right corner of a tile to remove it.
- Click the ellipsis (...) button in the lower-right corner of a tile and then click **Move** to move the given tile to a different group. Alternatively, you can drag tiles on the home page to place them in the required location.
- To save your changes, choose the **Close** button in the bottom-right corner.


6.3.2 Recent Activity & Frequently Used

These lists are generated automatically based on your activity. Clicking an entry in the list opens the respective app.

Enterprise Search

Note: Enterprise search is supported by the Web Client version for SAP HANA only.

This feature enables you to search for data.

Click the search icon  on the upper-right side of the screen and enter a value to search. By default, the search runs through the entire database. To narrow down your search, choose a specific category, such as a certain object or app.

When you initiate the search from within a certain app, the search is applied to the given object by default. You can change the search scope manually if needed.

You can filter the search results by various parameters based on the selected object, and choose whether to display it as a list, bar chart or pie chart.

In each parameter, you can click the **Show More** option. This enables you to further fine-tune the specific filter and best fit it to your needs.

Search results are displayed as follows:


The screenshot shows the SAP Fiori Search interface for 'Sales AR Invoice'. The left sidebar contains filters for 'Search In' (All, Activity, A/R Credit Memo, Business Partner, Sales AR Invoice, Sales Delivery, Sales Order) and 'Filter By' (BP Code, Status, Posting Date). The main area displays a list of results for 'Sales AR Invoice' with columns for Doc#, Doc Number, BP Code, and BP Name. Callouts provide instructions: 'Click a category to view only results related to the given category' points to the 'Sales AR Invoice' filter; 'Fine-tune the search results using the additional filters in this section' points to the 'Filter By' section; 'Click here to save the search as a tile' points to the Share icon; 'Click here to switch to table view' points to the Table icon; 'The search value is highlighted in the results' points to the 'Maxi-Teq' BP Name; and 'Click to display more details about the specific result' points to the expandable result card.

Using the icons in the upper-right corner, you may switch the results display between list (the default option) and table. When a table display is applied, you can choose which columns to display and in what order by clicking the Select Columns icon.

To save the search as a tile, click the Share icon in the top-right corner next to the Display as List and Display as Table icons. The Save as Tile dialog appears. The search parameters are populated automatically in the Title field. You can change the title if needed, adding a subtitle and description, and assign the tile to the relevant group.

Whenever you click this tile on your home page, up-to-date results will appear.

Notification Center

Click this icon  in the upper-right corner of the Web Client screen to open/close the notification center. Here you can view a list of activity notifications and delete (X) any irrelevant notifications.

- The **By Date** tab shows the notifications grouped by date.
- On the **By Priority** tab, the notifications for activities appear according to priority: high (red) first, followed by normal (yellow) and low (green) priority.
- Click a notification to open the respective activity.
- Click the **X** icon on the right side of the notification to dismiss it. The respective activity is not affected.

SAP Business One v10 – How to start using Web Client



Innormax can help guide you through the analysis and implementation of the most suitable solution for your company. Our consultants have a long track record of helping businesses of all shapes and sizes succeed in many different industries in the area of traceability.

Using our resources and supporting technology like SAP Business One Lot Tracking & Batch Traceability, we are the trusted advisors you need to help your business succeed.

[Contact Innormax](#) today to get started with your customized solution.



INNORMAX

www.innormax.com

619-241-4100

team@innormax.com

