

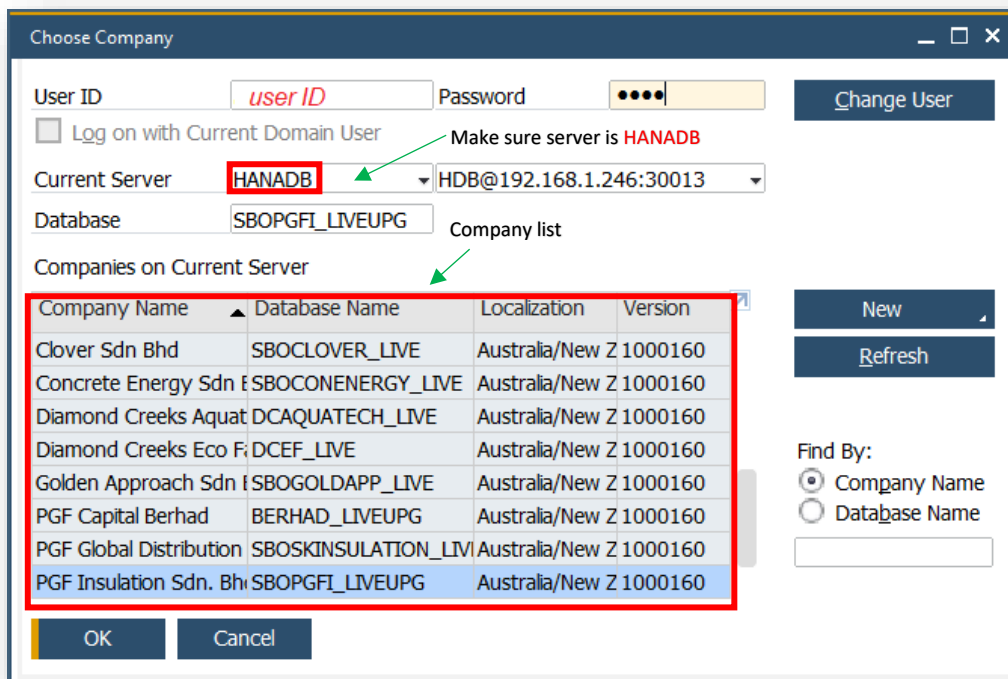
# SAP Business One Beginner Training

## 1. Login Screen



The screenshot shows the SAP Business One login window. It features a header with the SAP Business One logo and a background image of two people working at a computer. The login fields include: Company Name (PGF Insulation Sdn. Bhd.), User ID (user ID), Password (\*\*\*\*), and a checkbox for 'Logon with Windows Account'. At the bottom, there are buttons for 'OK', 'Exit', and 'Change Company'. A red box highlights the 'Change Company' button.

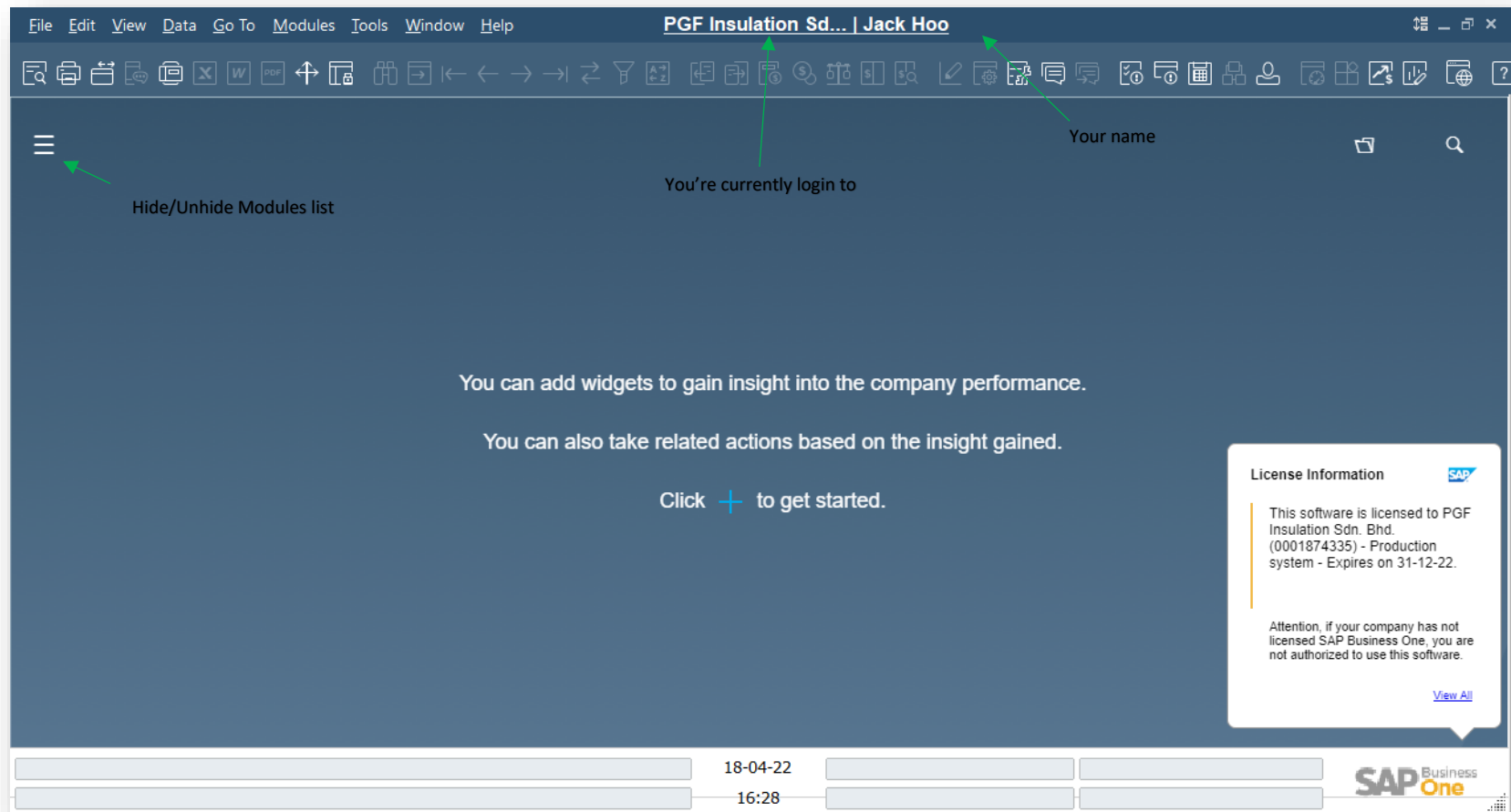
Company you want to login to, else click **Change Company**



The screenshot shows the 'Choose Company' dialog box. It contains fields for 'User ID' (user ID), 'Password' (masked with dots), and a 'Change User' button. There is a checkbox for 'Log on with Current Domain User' and a note: 'Make sure server is HANADB'. The 'Current Server' is set to HANADB, and the 'Database' is SBOPGFI\_LIVEUPG. A 'Company list' table is displayed below, showing a list of companies on the current server. The 'PGF Insulation Sdn. Bhd.' entry is highlighted in blue. To the right of the table are buttons for 'New' and 'Refresh', and a 'Find By' section with radio buttons for 'Company Name' (selected) and 'Database Name', followed by a search input field. At the bottom are 'OK' and 'Cancel' buttons.

Company Name	Database Name	Localization	Version
Clover Sdn Bhd	SBOCLOVER_LIVE	Australia/New Z	1000160
Concrete Energy Sdn Bhd	SBOCONENERGY_LIVE	Australia/New Z	1000160
Diamond Creeks Aquat	DCAQUATECH_LIVE	Australia/New Z	1000160
Diamond Creeks Eco F	DCEF_LIVE	Australia/New Z	1000160
Golden Approach Sdn Bhd	SBOGOLDAPP_LIVE	Australia/New Z	1000160
PGF Capital Berhad	BERHAD_LIVEUPG	Australia/New Z	1000160
PGF Global Distribution	SBOSKINSULATION_LIVE	Australia/New Z	1000160
PGF Insulation Sdn. Bhd.	SBOPGFI_LIVEUPG	Australia/New Z	1000160

2. Main screen



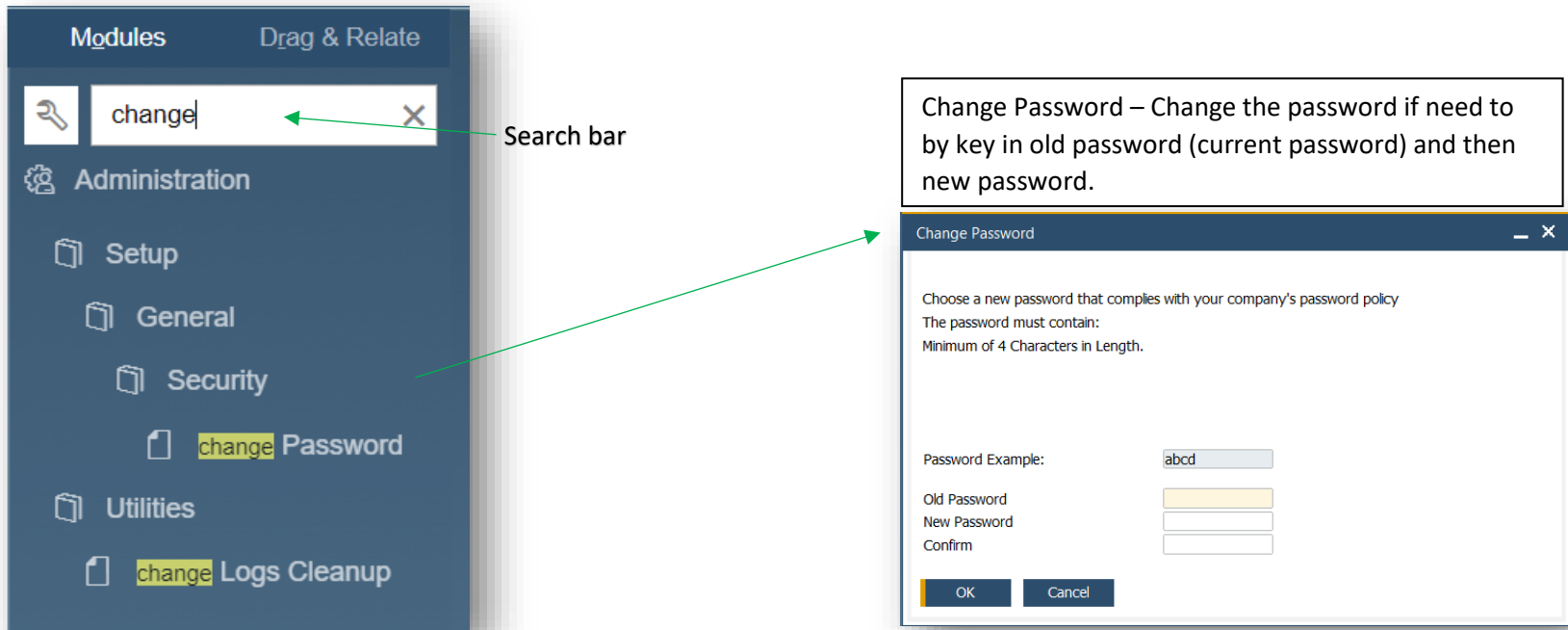
3. User Setup – You can change your name or update your email address. You can also do the settings at the Services tab according to your needs.

The screenshot shows the 'Users - Setup' dialog box with the 'General' tab selected. The 'User Name' field contains 'Your Name' and the 'E-Mail' field contains 'Your Email Address', both highlighted with red boxes. Other fields include 'User Code' (test), 'Defaults' (PROD), 'Employee', 'Mobile Phone', 'Mobile Device ID', 'Fax', 'Branch' (Main), 'Department' (MIS), and 'Groups'. A checkbox for 'Take Control of eDoc Processing in Electronic Document Monitor' is checked. Buttons at the bottom are 'OK', 'Cancel', and 'Copy Form Settings'.

The screenshot shows the 'Users - Setup' dialog box with the 'Services' tab selected. The 'Services' tab is highlighted with a red box. The 'At the Beginning of Each Session' section contains several checkboxes: 'Perform Data Check' (unchecked), 'Open Exchange Rates Table' (unchecked), 'Display Recurring Postings on Execution' (checked), 'Display Recurring Transactions on Execution' (checked), 'Send Alert for Activities Scheduled for Today' (unchecked), 'Display Inbox When New Message Arrives' (checked), 'Open Window for Credit Voucher Ref. Update' (unchecked), 'Open Postdated Checks Window' (unchecked), and 'Display Worklist When New Task Arrives' (checked). Below this are three input fields: 'Update Messages (Min.)' (0), 'Screen Locking Time (Min.)' (30), and 'Open Postdated Credit Vouchers Window' (No). The 'Alternative Keyboard Usage' section has 'Show License Information at Startup' checked, and 'Use Numeric Keypad Enter Key as Tab Key' unchecked. A 'Restore Defaults' button is located at the bottom right. Buttons at the bottom are 'OK', 'Cancel', and 'Copy Form Settings'.

4. Search bar and Change password

Search bar – Type keyword in the search bar for quick access, instead of browsing through the long list  
Else Navigate to Administration > Setup > General > Security > change Password



5. Form settings – Main Menu, you can choose to hide those modules that not in use in your daily basis or bring back those modules that you needed but was missing from the Main Menu

The screenshot shows the 'Form Settings - Main Menu' dialog box. On the left, a 'Modules' sidebar lists various categories like Administration, Financials, CRM, etc. A search bar labeled 'Look Up Menus' is highlighted with a red box and an arrow. The main dialog window contains a table with the following data:

Menu Item	Visible
▶ Administration	<input checked="" type="checkbox"/>
▶ Financials	<input checked="" type="checkbox"/>
▶ CRM	<input checked="" type="checkbox"/>
▶ Opportunities	<input type="checkbox"/>
▶ Sales - A/R	<input checked="" type="checkbox"/>
▼ Purchasing - A/P	<input checked="" type="checkbox"/>
Purchase Blanket Agreement	<input checked="" type="checkbox"/>
Purchase Request	<input checked="" type="checkbox"/>
Purchase Quotation	<input checked="" type="checkbox"/>
Purchase Order	<input checked="" type="checkbox"/>
Goods Receipt PO	<input checked="" type="checkbox"/>
Goods Return Request	<input checked="" type="checkbox"/>
Goods Return	<input checked="" type="checkbox"/>
A/P Down Payment Request	<input type="checkbox"/>
A/P Down Payment Invoice	<input type="checkbox"/>
A/P Invoice	<input type="checkbox"/>
A/P Credit Memo	<input type="checkbox"/>
A/P Reserve Invoice	<input checked="" type="checkbox"/>
Recurring Transactions	<input checked="" type="checkbox"/>
Recurring Transaction Templates	<input checked="" type="checkbox"/>
Landed Costs	<input checked="" type="checkbox"/>
Procurement Confirmation Wizard	<input checked="" type="checkbox"/>
Purchase Quotation Generation Wizard	<input checked="" type="checkbox"/>
Document Printing	<input checked="" type="checkbox"/>
▶ Purchasing Reports	<input checked="" type="checkbox"/>
▶ Business Partners	<input checked="" type="checkbox"/>
▶ Banking	<input checked="" type="checkbox"/>
▶ Inventory	<input checked="" type="checkbox"/>
▶ Resources	<input checked="" type="checkbox"/>
▶ Production	<input checked="" type="checkbox"/>

At the bottom of the dialog, there are buttons for 'OK', 'Cancel', 'Collapse All', 'Expand All', and 'Apply Authorization'.

- 6. Form settings - you can choose to hide those field that not in use in your daily basis or bring back those field that you needed but was missing from the Form

**Form Settings**

Form Settings - Purchase Request

Select UI Template: [Dropdown] Apply

Table Format | Row Format | Document

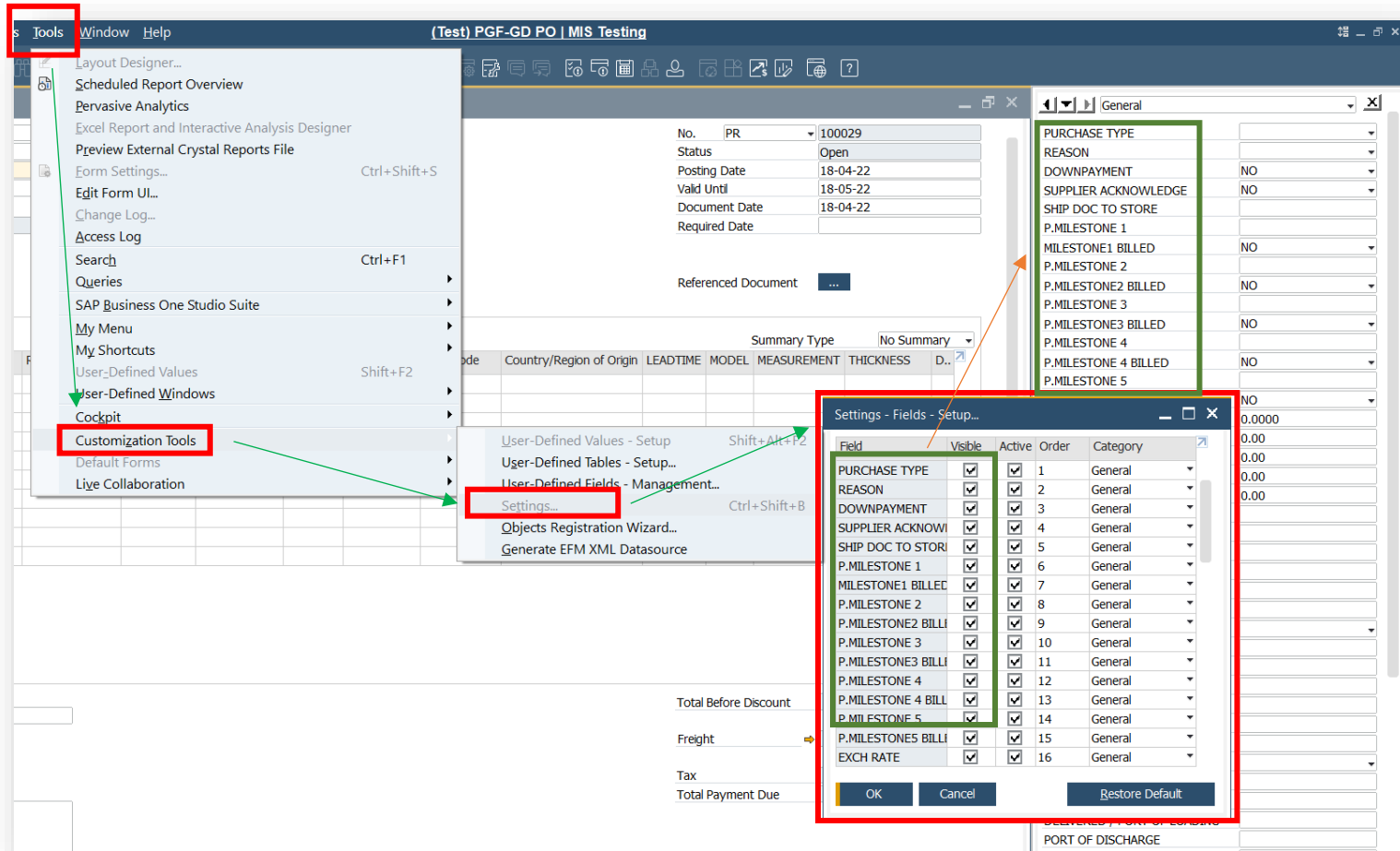
Find Next

Column	Visible	Active
#	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Type	<input type="checkbox"/>	<input type="checkbox"/>
Item No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Item Description	<input type="checkbox"/>	<input type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bar Code	<input type="checkbox"/>	<input type="checkbox"/>
Mfr No.	<input type="checkbox"/>	<input type="checkbox"/>
Serial No.	<input type="checkbox"/>	<input type="checkbox"/>
Factor 1	<input type="checkbox"/>	<input type="checkbox"/>
Factor 2	<input type="checkbox"/>	<input type="checkbox"/>
Factor 3	<input type="checkbox"/>	<input type="checkbox"/>
Factor 4	<input type="checkbox"/>	<input type="checkbox"/>
Required Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Required Qty.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel Restore Default

Item/Service Type	Item	Item No.	Vendor	Required Date	Required Qty.	Info Price	Discount %	Tax Code	Total (LC)	UoM Code	Country/Reg
1							0.00	SST-P			

7. Form Settings - you can choose to hide those UDF (User-Defined Field) that not in use in your daily basis or bring back those UDF that you needed but was missing from the Form



8. Always use Tab to navigate to the next field. Enter mean Add

The screenshot shows the SAP Business One Purchase Request form. The window title is "[Test] PGF-GD PO | MIS Testing". The form is divided into several sections:

- Header:** Located at the top left, it contains fields for "Requester" (User), "Requester Name" (Your Name), "Branch" (Main), and "Department" (MIS). It also includes a checkbox for "Send E-Mail if PO or GRPO is Added" and an "E-Mail Address" field. To the right of the header are fields for "No. PR" (100032), "Status" (Open), "Posting Date" (19-04-22), "Valid Until" (19-05-22), "Document Date" (19-04-22), and "Required Date". A "Referenced Document" field is also present.
- Body/Content:** A large table with columns for "# Item No.", "Vendor", "Required Date", "Required Qty.", "Info Price", "Discount %", "Tax Code", "Total (LC)", "UoM Code", "Country/Region of Origin", "LEADTIME", "MODEL", "MEASUREMENT", "THICKNESS", "DENSITY", "WIDTH", "LENGTH", "WEIGHT", "WOOL PER KG", "EX-FACTORY PRICE", and "PA...". The first row shows item 1 with a discount of 0.00 and tax code SST-P. The "Summary Type" and "No Summary" columns are also visible.
- Footer:** Includes fields for "Owner", "Remarks", "Total Before Discount", "Freight", "Tax", and "Total Payment Due" (MYR 0.00). There are "Add & Close" and "Cancel" buttons at the bottom left, and "Copy from" and "Copy To" buttons at the bottom right.
- General Tab:** A vertical sidebar on the right side of the form, titled "General", contains various fields such as "PURCHASE TYPE", "REASON", "DOWNPAYMENT", "SUPPLIER ACKNOWLEDGE", "SHIP DOC TO STORE", "MILESTONE 1-5", "EXCH RATE", "BANK CHARGES", "TOTAL AMT", "TOTAL AMT FC", "MILESTONE RMK 1-5", "UDF", "INCOTERMS", "PROJECT NAME", "PROJECT AREA / QTY", "SHIPPING DATE", "ETA", "ITD", "REQUESTOR NAME", "No. OF CONTAINER", "CONTAINER TYPE", "EST. DEPARTURE DATE", "EST. ARRIVAL DATE", "DELIVERED / PORT OF LOADING", "PORT OF DISCHARGE", "INCOTERM", "PAYMENT TERM", "REVISION", "ACC NO.", "DELIVERED BY", "Guard Verified", "BOOKING NO", "SHIPMENT CLOSING DATE", "SHIPMENT CLOSING TIME", "CF CHECKOUT", "CF REASON", "RETURN TYPE", and "PO For Department".

9. Form - Find mode, to look for previous entry

**Activate Find mode**

**Asterisk (\*) mean find**

**Result**

**You can filter the result according to your needs**

#	Field	Rule	Value	To Value
1	#			
2	PRQ No.			
3	Posting Date	In Range	01-01-22	01-03-22
4	Requester Type			
5	Requester			
6	Price Mode			
7	Remarks			
8	Valid Until Date			

#	PR...	Postin...	Requeste...	Requester	Remarks	Vali...
1	100006-05-20	User	Loganathan Nagaiah		KLEEN Multi Purpose 06-06-	
2	1000012-05-20	User	Loganathan Nagaiah		Redo due to PO amentm 12-06-	
3	1000023-05-20	User	Loganathan Nagaiah		Requested by Mr Ming Ch 23-06-	
4	1000003-12-20	User	HR-Admin		request by sti 03-01-	
5	1000010-03-21	User	WF Chin		Breathable Membrane 14 10-04-	
6	1000007-05-21	User	HR-Admin		Request by Ms Chin 07-06-	
7	1000010-05-21	User	WF Chin		Testing for AS/NZS 4200. 10-06-	
8	1000011-05-21	User	WF Chin		AS 2001.2.19 Burst Force 11-06-	
			ier		Description : AS /NZS 4201-07-	
			ier		AS 1530.2 Flammability te 13-09-	

10. Form - Add mode - Insert date

No.	PR	100032
Status	Open	
Posting Date	19-04-22	
Valid Until		
Document Date		
Required Date		
Referenced Document		
Summary Type		
MODEL	MEASUREMENT	THICKNESS

April 2022

Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Posting date can only be earlier or equal today's date

1. Select date from the date icon

No.	PR	100032
Status	Open	
Posting Date	19-04-22	
Valid Until	19-05-22	
Document Date	19-04-22	
Required Date	+7	

2. + How many days from today's date

No.	PR	100032
Status	Open	
Posting Date	19-04-22	
Valid Until	19-05-22	
Document Date	19-04-22	
Required Date	2005	

3. Key in date in format of ddmm or ddmmyyy

11. Fill in the form

Customer Name: poly  
 Contact Person: CP024 - POLY GLASS FIBRE (M) BHD- 42138-X  
 Customer Ref. No.: 1 results found  
 Local Currency: [dropdown]

Insert keyword, a list of result will be shown

Contents

Item/Service Type

#	Item No.	Item
1		

List of Items

Find: [input]

#	Item No.	Item Description	In Stock	Old ...
1	0-01404	Brass union fitting for tubing M6 x M6 , Fit-Lok	20.000000	
2	0FFH-76	136/02/10 - Purchase Building from Bhd	0.000000	
3	25902	Ecovool Classic Faced Blanket EWBL 1.35 50mm 1200x15000mm (16) 5/5 Foil Printed	0.000000	
4	2G-FH-00010	22.4"x4.4" x5.5"x11" Brick	3.000000	2G-FH4
5	2G-FH-00020	14"x12"x6" Brick	3.000000	2G-FH4
6	2G-FH-00030	4.4"x12"x6" Brick	3.000000	2G-FH4
7	2G-FH-00040	7"x8"x15"x4" Brick	2.000000	2G-FH4
8	2G-FH-00050	7"x4.4"x7"x4.4"x9" Brick	2.000000	2G-FH4
9	2G-FH-00060	Zirmul 10x6x2.5" Brick	11.000000	2G-FH4
10	2G-FH-00070	9x5.5x2.5" Brick	3.000000	2G-FH4
11	2G-FH-00080	Zirmul 9x6x2.5" Brick	4.000000	2G-FH4
12	2G-FH-00090	14"x12"x18" Brick	1.000000	2G-FH4
13	2G-FH-00100	Zirmul 10x7x2.5" Brick	1.000000	2G-FH4
14	2G-FH-00110	Zirmul 9x9x2.5" Brick	3.000000	2G-FH4
15	2G-FH-00120	Zirmul 9x4.5"x2.5x2 Brick	5.000000	2G-FH4
16	2G-FH-00130	Zirmul 6x5.5x2.5" Brick	7.000000	2G-FH4
17	2G-FH-00140	Zirmul 10x6x2.5" Brick	3.000000	2G-FH4
18	2G-FH-00150	Black 10x12x3" Brick	1.000000	2G-FH4
19	2G-FH-00160	Black 14x3x9.5" Brick	1.000000	2G-FH4
20	2G-FH-00170	28x12.5x12x6" Brick	1.000000	2G-FH4
21	2G-FH-00180	Black 18x9x6" Brick	1.000000	2G-FH4

Buttons: Choose, Cancel, New

List of Items

Find: \*tape

#	Item No.	Item Description	In Stock
1	TP-028	50 mm Masking Tape	85.000000
2	PM.11.66	ALUMINIUM FOIL TAPE	0.000000
3	ZTAP-0001	Cellophine Tape	0.000000
4	ZPRT-0017	EZ-Label Printer (XZ-12WE1) 12MM X 8M Black On White Tape	0.000000
5	ZTAP-0004	Masking Tape	0.000000
6	ZTYW-0002	Typewriter Correction Tape	0.000000
7	PCON-33720	U*12mm Masking Tape	0.000000
8	O-00840	yellow dark sleeve sand tape	1.000000
9	O-00800	yellow sleeve sand tape	0.000000

Double click on Item Description and insert the keyword

Use Asterisk (\*) with keyword

\*keyword = Result end with keyword

keyword\* = Result start with keyword

\*keyword\* = keyword in between the result

12. Add, After confirm that the information are correct, you can save as draft or press Enter or Click the Add button

#	Item No.	Item Description	Item De
1	➔	MCON-50 SGP Welding Reducer, 8"x5"	
2			

Add & New : Add the document and continue with a fresh screen  
Add & View : Add the document and view it  
Add & Close : Add the document and close the form

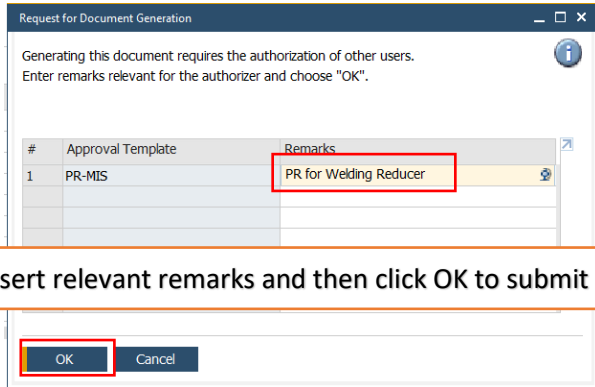
- Add & New
- Add & View
- Add & Close
- Add & New

Cancel

- Row Details...
- New Activity
- Volume and Weight Calculation...
- Opening and Closing Remarks
- Save as Draft

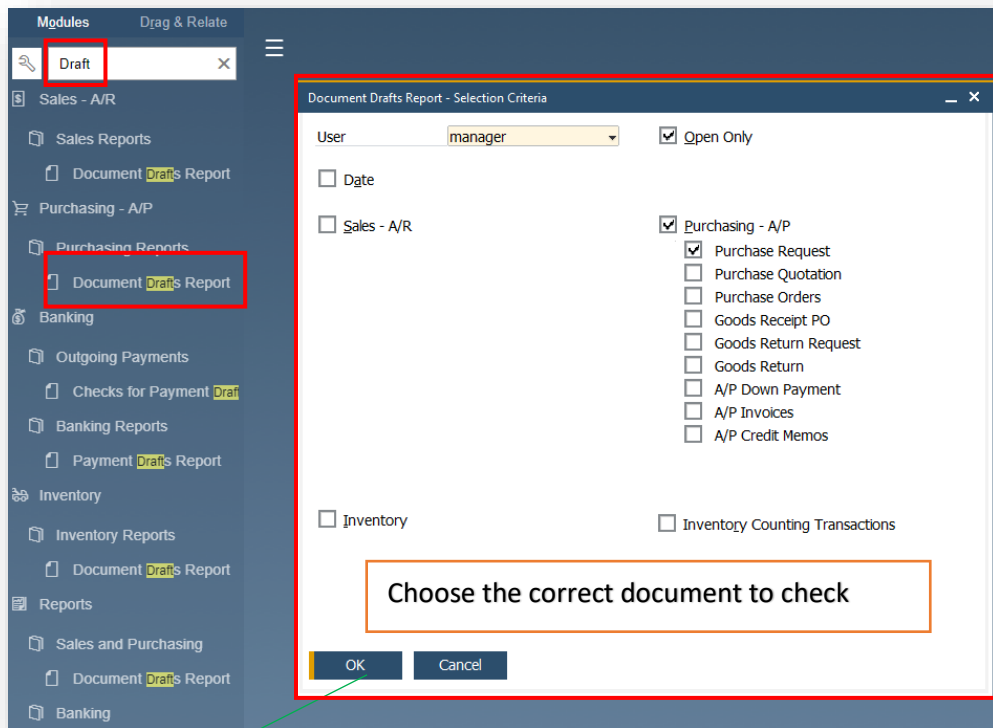
Right click on form and choose Save as Draft to continue later

13. Approval screen will show if the document need approval



Insert relevant remarks and then click OK to submit the approval

- 14. Check approval status or edit draft you saved earlier, go to Document Draft Report
  - a. Search with keyword : draft
  - b. Go to Purchasing – A/P > Purchasing Report > Document Drafts Report



Draft No.	Document	Document No.	Cust./Vend. Ref. No.	Approval Status	Posting Date
6735	Purchase Request	0		Rejected	28-08-19
39656	Purchase Request	107589		Pending	01-03-22
39657	Purchase Request	107589		Pending	01-03-22
39658	Purchase Request	107589		Pending	01-03-22
39659	Purchase Request	107589		Pending	01-03-22
39662	Purchase Request	107589		Pending	20-03-22

Click the gold arrow to open and edit draft

Approval status

15. Check approval status > Approval Decision Report
  - a. Search with keyword, Approval

Approval Decision Report - Selection Criteria

**Decision**

No Decision Yet  
 Approved  
 Rejected

Originator From: Jack Hoo To: Jack Hoo  
 Authorizer From: To:  
 Template From: To:  
 Request Date From: To:

OK Cancel

Approval Decision Report

Document Type	Document No.	Originator	Status	Stage	Authorizer	Answer	Answer Date
Purchase Request	106893	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	106893	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	
Purchase Request	107074	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	107074	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	
Purchase Request	107373	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	107373	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	
Purchase Request	107451	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	107451	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	
Purchase Request	107547	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	107547	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	
Purchase Request	107546	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	107546	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	
Purchase Request	107548	Jack Hoo	Generate	Purchaser_Approval	Purchaser	Pending	
Purchase Request	107548	Jack Hoo	Generate	Purchaser_Approval	Sally Teoh	Pending	

OK Cancel

Approval Status

Approval Stages - Setup

Stage Name: Purchaser\_Approval  
 Stage Description: PR\_Approval  
 No. of Approvals Required: 1  
 No. of Rejections Required: 1

#	Authorizer	Department
1	Purchaser	
2	Sally Teoh	
3	Lau Ai Nee	
4		

OK Cancel

16. Check approval status > Approval Status Report

The screenshot shows the 'Approval Status Report - Selection Criteria' dialog box and the 'Approval Status Report' table. Annotations include 'Approval Status' pointing to the Status column, 'Open the draft document' pointing to a draft key, and 'Do the approval here' pointing to the Answer column in a detailed view.

**Approval Status Report - Selection Criteria**

**Document Status**

Pending     Approved     Rejected  
 Generated     Generated by Authorizer     Canceled

Originator From: Jack Hoo To: Jack Hoo  
 Authorizer From: To:  
 Template From: To:  
 Request Date From: To:  
 BP Code From: To:  
 Total (LC) From: To:

**Sales - A/R**  
 Sales Quotation   
 Sales Order   
 Delivery   
 Return Request   
 Return   
 A/R Down Payment   
 A/R Invoice   
 A/R Credit Memo

**Purchasing - A/P**  
 Purchase Request   
 Purchase Quotation   
 Purchase Order   
 Goods Receipt PO   
 Goods Return Request   
 Goods Returns

**Inventory**  
 Goods Receipt   
 Goods Issue   
 Inventory Transfer Request   
 Inventory Transfer   
 Inventory Opening Balance

**Blanket Agreement**  
 Sales Blanket Agreements   
 Purchase Blanket Agreements

OK Cancel

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**Approval Status Report**

Document Type	Document No.	Document Draft No.	Originator	Template	Status	Remarks	Due Date	Posting Date	BP Code	BP Name	Doc. Total (LC)	Draft Key	Draft Updated By	Draft Update Date	Draft Update Time	Draft Remarks
Purchase Request	107589		Jack Hoo		Pending		01-04-22	01-03-22			MYR 33.00	39656	Jack Hoo	01-03-22	11:29:45	
Purchase Request	107589		Jack Hoo		Pending		01-04-22	01-03-22			MYR 9.00	39657	Jack Hoo	01-03-22	11:36:28	
Purchase Request	107589		Jack Hoo		Pending		01-04-22	01-03-22			MYR 20.00	39658	Jack Hoo	01-03-22	11:57:12	
Purchase Request	107589		Jack Hoo		Pending		01-04-22	01-03-22			MYR 300.00	39659	Jack Hoo	01-03-22	11:58:07	
Purchase Request	107589		Jack Hoo		Pending		20-03-22	20-03-22			MYR 0.00	39662	Jack Hoo	20-04-22	14:18:14	
Purchase Request	107589		Jack Hoo	PR-MIS	Pending	PR for welding reducer						39662				

Open the draft document

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**Approval Status Report - Detailed View**

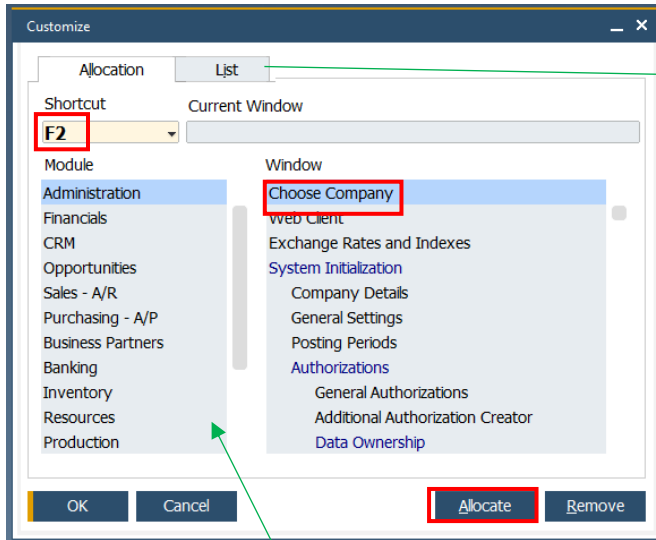
Stage	Authorizer	Answer	Answer Date	Answer Time	Remarks
manager	Jack Hoo	Pending	20-04-22		

Do the approval here

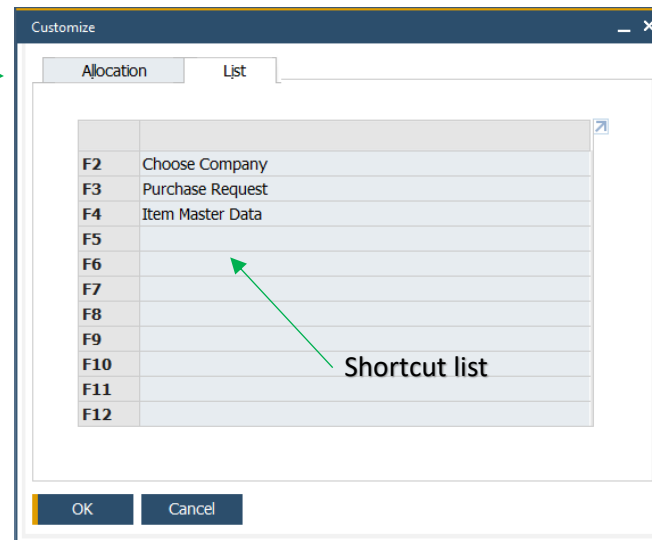
OK Cancel Collapse Expand

17. Shortcut (Tools > My Shortcuts > Customize)

- Useful for frequent use modules
- Eg: Allocate F2 key as Choose Company

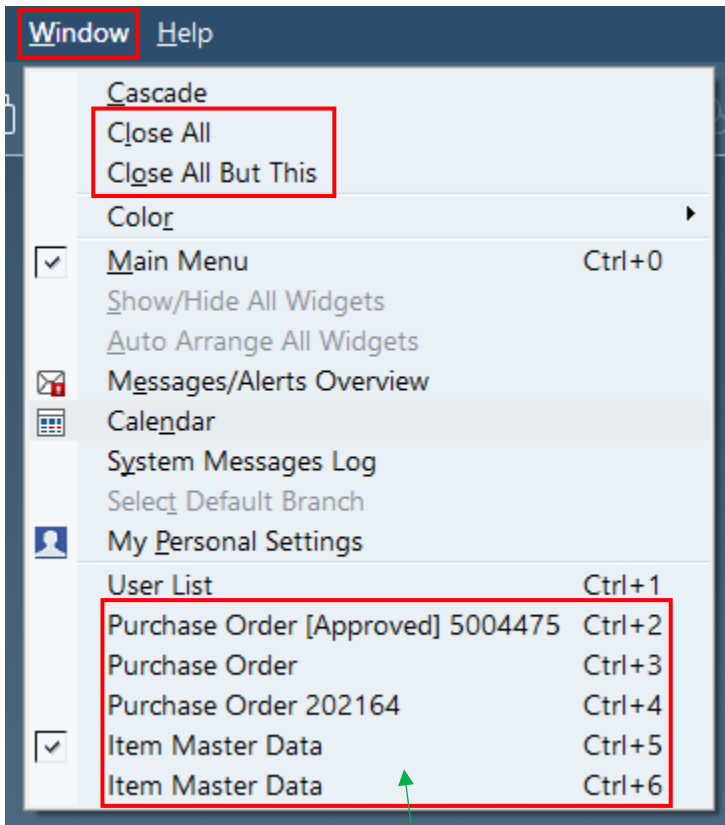


Module list



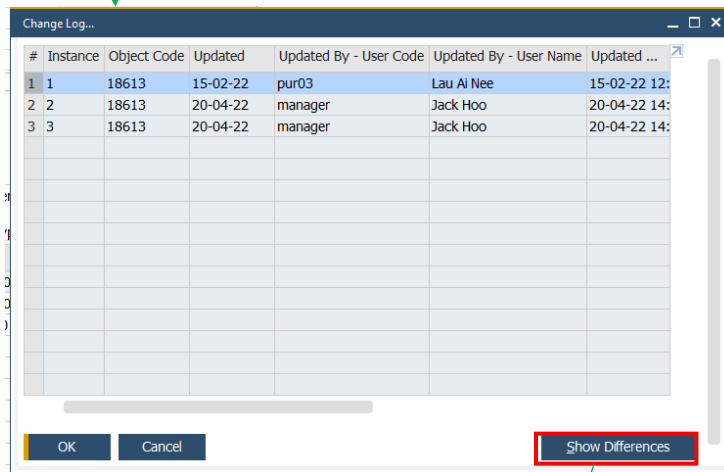
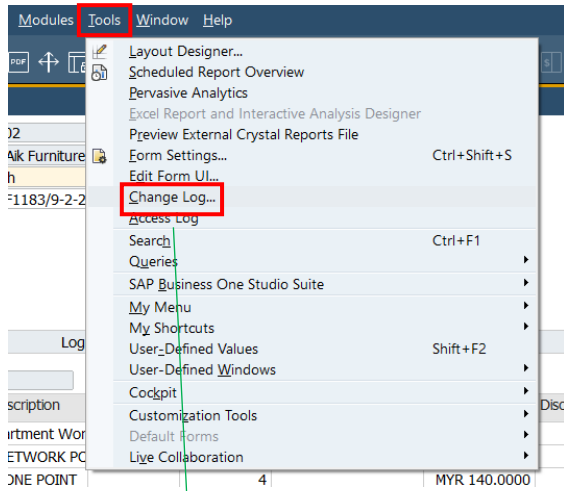
Shortcut list

18. Close All (Close all the opened windows)



Currently opened windows

19. Change log (Can only view the module that have full access)



Differences

#	Date	Changed Field	Previous Value	New Value	Updated By - User...	Updated By - User Name
2	20-04-22	Data Version	1	2	manager	Jack Hoo
2	20-04-22	Text		For delivery	manager	Jack Hoo
3	20-04-22	Total Document	825.00	835.00	manager	Jack Hoo
3	20-04-22	Total Document (SC)	825.00	835.00	manager	Jack Hoo
3	20-04-22	Data Version	1	3	manager	Jack Hoo
3	20-04-22	Quantity	10.00	15.00	manager	Jack Hoo
3	20-04-22	Remaining Open Quantity	3.00	8.00	manager	Jack Hoo
3	20-04-22	Total Row	20.00	30.00	manager	Jack Hoo
3	20-04-22	Credited Quantity	3.00	8.00	manager	Jack Hoo
3	20-04-22	Total Row (FC)	20.00	30.00	manager	Jack Hoo
3	20-04-22	Packing Quantity	10.00	15.00	manager	Jack Hoo
3	20-04-22	Text		For delivery	manager	Jack Hoo
3	20-04-22	Gross Total	20.00	30.00	manager	Jack Hoo
3	20-04-22	Gross Total (SC)	20.00	30.00	manager	Jack Hoo
3	20-04-22	Quantity - Inventory UoM	10.00	15.00	manager	Jack Hoo
3	20-04-22	Open Quantity (Inventory UoM)	3.00	8.00	manager	Jack Hoo