

Guide - The limitations in screen layout using the Item Placement Tool

In the B1 Usability Package we have the Item Placement Tool that allow you to redesign the windows in SAP Business One and add your own additional fields, and while this is a strong tool it is still bound to the general rules and limitations in the SAP Business One client and the SDK. This document will try to describe what can and can't be done.

Sizeable windows and “inaccessible space”

Let's look at a sample. Here we have an open Sales Order where we look at the accounting tab.

The screenshot shows a 'Sales Order' form with several sections. Red boxes highlight large empty areas: one in the top right, one in the center right, and one in the bottom right. The form includes fields for Customer information, Accounting tabs (Contents, Logistics, Accounting, Attachments), Journal Remark, Payment Terms, Central Bank Ind., Manually Recalculate Due Date, Cash Discount Date Offset, Sales Employee, Owner, Remarks, and a summary table on the right.

No.	Primær	358
Status		Open
Posting Date		13.01.14
Delivery Date		
Document Date		13.01.14

BP Project	
Cancellation Date	
Required Date	
Indicator	
Federal Tax ID	
Order Number	

Total Before Discount	
Discount	%
Freight	→
<input type="checkbox"/> Rounding	
Tax	
Total	

Without thinking I will now I've marked potential good spaces to place new content and from this point it look like we have a lot of room for a lot for additional data.

Let's think a bit more about this. Since this window is sizeable and we are not showing the screen in its minimum size our perception of a lot of room is misleading. Let's look at the same window but its minimum size.

This reveal an entire new but true image on what room we really have to work with.

Some will perhaps now remember that with the Item Placement Tool that we have the option to set a custom width and height in the configuration and that this must surely make us able to have more content. Let's again take that as a sample and give us a lot of room to work with using a size of 800 width, 700 height.

Sales Order
[min] [max] [close]

Customer <input type="text"/> Name <input type="text"/> Contact Person <input type="text"/> Customer Ref. No. <input type="text"/> Local Currency <input type="text"/>	No. <input type="text"/> <input type="text"/> 358 Status <input type="text"/> Open Posting Date <input type="text"/> 13.01.14 Delivery Date <input type="text"/> Document Date <input type="text"/> 13.01.14
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Contents	Logistics	Accounting	Attachments
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Journal Remark <input type="text"/> <div style="border: 2px solid red; height: 30px; margin-top: 5px;"></div> Payment Terms <input type="text"/> Payment Method <input type="text"/> Central Bank Ind. <input type="text"/> Manually Recalculate Due Date: <input type="text"/> 0 Months + <input type="text"/> 0 Days Cash Discount Date Offset: <input type="text"/> <div style="border: 2px solid red; height: 30px; margin-top: 5px;"></div>	BP Project <input type="text"/> Cancellation Date <input type="text"/> Required Date <input type="text"/> Indicator <input type="text"/> Federal Tax ID <input type="text"/> Order Number <input type="text"/> <div style="border: 2px solid red; height: 80px; margin-top: 10px;"></div>
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Sales Employee <input type="text"/> - Ingen SL - Owner <input type="text"/> <div style="border: 2px solid red; height: 40px; margin-top: 5px;"></div> Remarks <input type="text"/>	Total Before Discount <input type="text"/> Discount <input type="text"/> % <input type="text"/> Freight <input type="text"/> → <input type="text"/> <input type="checkbox"/> Rounding <input type="text"/> NOK 0,00 Tax <input type="text"/> Total <input type="text"/> NOK 0,00 <div style="border: 2px solid red; height: 40px; margin-top: 5px;"></div>
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Sales Order

Customer No.
 Name Status
 Contact Person Posting Date
 Customer Ref. No. Delivery Date
 Local Currency Document Date

Contents Logistics Accounting Attachments

Item/Service Type Summary Type

#	Item No.	Item Description	Quantity	No. of...
1				

Sales Employee Total Before Discount
 Owner Discount %
 Freight
 Rounding
 Tax
 Total

Remarks

Add Cancel Copy From Copy To

Now we have a lot of space that we can use but because of certain limitations how the SDK work, this additional space is in most eyes in all the incorrect places (compared to the first screen shot), and because how resizing works in SAP Business One (see below) we can end up with resize-problems here

An entire different problem away from the technical standpoint is that you should always also remember that your users might have too small screens to show your new big size of the window.

How resizing work in SAP Business One.

SAP Business One resizing of windows follow a very simple but limited set of rules. If we look at the basic window of a sales order.

Sales Order

Section 1

Customer Name
Contact Person
Customer Ref. No.
Local Currency

Section 2

No. 358
Status: Primær
Posting Date: 13.01.14
Delivery Date
Document Date: 13.01.14

Contents | Logistics | Accounting | Attachments

Item/Service Type: Item
Summary Type: No Summary

#	Item No.	Item Description	Quantity	No. of ...
1				

Section 3

Sales Employee: - Ingen SL -
Owner

Remarks

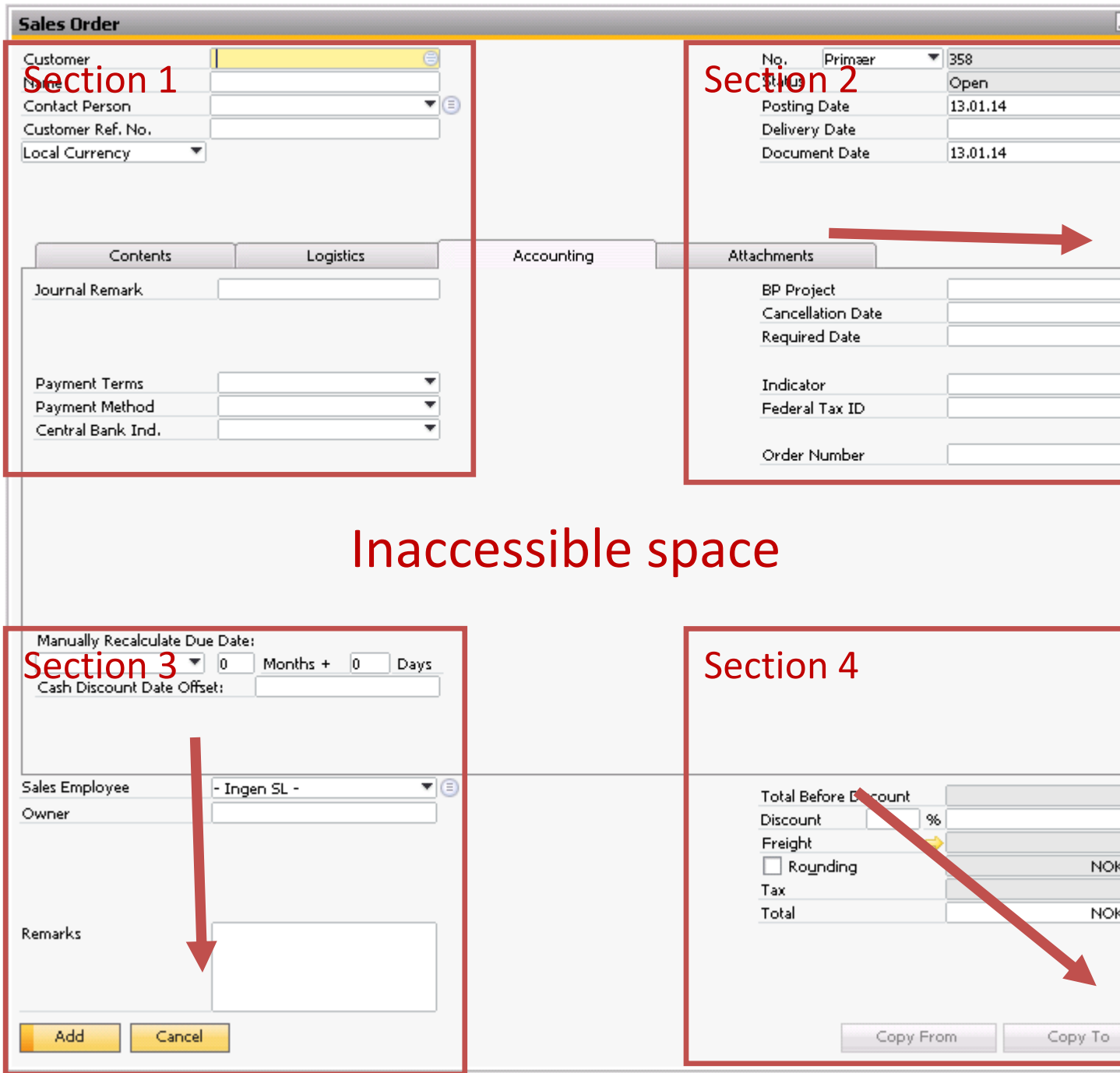
Section 4

Total Before Discount
Discount %
Freight →
 Rounding
Tax
Total: NOK 0,00

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What SAP actually does while resizing is that it divides the screen in to 4 equally big portions.

- Anything within section 1 will always stay in place
- Anything within section 2 will always move right
- Anything within section 3 will always move down
- Anything within section 4 will always move right and down



Some might say why can SAP Business One then resize its windows, and the answer is matrix lines.

Let's look at the Content Tab for the screenshot above.

Section 1

Section 2

Section 3

Section 4

More room for columns and rows

#	Item No.	Item Description	Quantity	No. of Packages	U...
1					

Here we use all the existing space for additional rows and columns which in most cases is essential.

So what can be done and what recommendations are there.

- Adding additional width to a window tend not to give resize problems so use that if you need more room but be aware that the additional room you will get will be to the right of the original content.
 - o You can of cause begin to move all the original content but be aware this will be take a fairly large time.
- Use the minor spaces that we have in page 2. These are the easiest to use.

- If there are data on the existing screen that you don't use, then perhaps you can hide that and make room for your content.
- If something can't be hidden then you might be able to decrease the width or height of the data making more room for your data.
- If there is a collection of Tabs on the window that you are modifying, perhaps a good solution would be to create your own tab and put the data there.