

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

In the B1 Usability Package we have the Item Placement Tool that allows 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 the SAP Sales Order window with the Accounting tab selected. Red boxes highlight several areas of the interface that are inaccessible for customization using the Item Placement Tool:

- A box around the top right header area containing fields like No., Status, Posting Date, Delivery Date, and Document Date.
- A large box around the central accounting area, including the Journal Remark field, Payment Terms, Payment Method, Central Bank Ind., and the BP Project section.
- A box around the bottom right summary area containing Total Before Discount, Discount, Freight, Rounding, Tax, and Total.

Other visible fields include Customer, Name, Contact Person, Customer Ref. No., Local Currency, Cancellation Date, Required Date, Indicator, Federal Tax ID, Order Number, Sales Employee, Owner, Remarks, and a manually recalculate due date section.

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

The screenshot shows the 'Sales Order' window in its minimum size. The window is divided into several sections. At the top, there are fields for Customer (Name, Contact Person, Customer Ref. No., Local Currency), No. (Primary), Status (Open), Posting Date (12/13/10), Delivery Date, and Document Date (12/13/10). Below this, there are tabs for Contents, Logistics, and Accounting. The Accounting tab is selected, showing fields for Journal Remark, BP Project, Cancellation Date, Required Date, Payment Terms, Payment Method, Central Bank Ind., Indicator, Federal Tax ID, Order Number, and a section for manually recalculating due dates (Months + 0, Days). At the bottom, there are fields for Sales Employee (-No Sales Employee-), Owner, and Remarks. On the right side, there is a summary section with fields for Total Before Discount, Discount (%), Freight (USD 5.00), Rounding (USD 0.00), Tax, and Total (USD 5.00). Red boxes highlight several areas where the content is cut off or overlapping, indicating a cramped layout.

This reveals an entirely new but true image of 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, 600 height.

The screenshot shows the SAP Sales Order window. The top section contains customer and order details. Below this is a tabbed interface with 'Contents', 'Logistics', and 'Accounting' tabs. The 'Contents' tab is active, showing a table with columns for Item No., Item Description, Quantity, Unit Price, Discount, Tax, and Total. The table has one row with Item No. 1. To the right of the table is a large empty rectangular area. Below the table are fields for Sales Employee, Owner, and Remarks. At the bottom right, there is a summary section with fields for Total Before Discount, Discount, Freight, Rounding, Tax, and Total. The bottom of the window has buttons for 'Add', 'Cancel', 'Copy From', and '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

This screenshot shows the same SAP Sales Order window but resized to a larger size. The 'Contents' tab is still active. The table now has a 'Kit Number' column. The first row of the table has '1' in the Item No. column and 'Kit Number' in the Item Description column. A red rectangle highlights the 'Kit Number' text in the first row. The 'Sales Employee' field is now positioned in the middle of the item matrix, which is a result of the resizing process.

Here is the above window resized to an even bigger size and strange things like the Sales Employee ends up in the middle of the item matrix. All because the way the resize rules below works and limits us.

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.

The screenshot shows the 'Sales Order' window in SAP Business One, divided into four sections by red lines. Red arrows indicate the movement of content during resizing:

- Section 1 (Top Left):** Contains customer data fields (Customer Name, Contact Person, Customer Ref. No., Local Currency). A red arrow points down from this section.
- Section 2 (Top Right):** Contains order data fields (No., Status, Posting Date, Delivery Date, Document Date). A red arrow points right from this section.
- Section 3 (Bottom Left):** Contains accounting and payment fields (Journal Remark, Payment Terms, Payment Method, Central Bank Ind., Manually Recalculate Due Date, Cash Discount Date Offset, Sales Employee, Owner, Remarks). A red arrow points down from this section.
- Section 4 (Bottom Right):** Contains summary fields (BP Project, Cancellation Date, Required Date, Indicator, Federal Tax ID, Order Number, Total Before Discount, Discount, Freight, Rounding, Tax, Total). A red arrow points right and down from this section.

Buttons at the bottom include 'Add', 'Cancel', 'Copy From', and 'Copy To'.

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

**Sales Order**

**Section 1**

Customer Name  
Contact Person  
Customer Ref. No.  
Local Currency

**Section 2**

No. 71  
Status Open  
Posting Date 12/13/10  
Delivery Date  
Document Date 12/13/10

**Section 3**

Manually Recalculate Due Date: 0 Months + 0 Days  
Cash Discount Date Offset:  
Sales Employee No Sales Employee-  
Owner  
Remarks  
Add Cancel

**Section 4**

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

Total Before Discount  
Discount %  
Freight USD 5.00  
Rounding USD 0.00  
Tax  
Total USD 5.00  
Copy From Copy To

**Inaccessible space**

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

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.