

SAP Business One

Boost Sales Efficiency

Displaying Top Customer Items using Formatted Search

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1. Formatted Searches in SAP Business One

Formatted searches are a powerful and versatile feature in SAP Business One that empower users to enhance forms with custom, dynamic data retrieval without requiring any coding expertise. They can seamlessly populate fields, perform complex calculations, or execute tailored queries—like the one detailed in this guide—which efficiently displays a customer’s top sales items directly on the sales order form, streamlining the order entry process.

2. Why Formatted Search?

Have you ever wondered what items your customer has recently purchased to tailor your next sales order for maximum impact? In SAP Business One, you have several practical options to explore this data:

- Drag and relate the BP code directly on the sales order menu for quick insights.

#	Number	Document Type	Status	Posting Date	Customer/Vendor Code	Customer/Vendor Name	Document Total
1	4	Item	Closed	01/25/2006	C23900	Parameter Technology	7,473.00
2	9	Item	Closed	03/05/2006	C23900	Parameter Technology	10,494.00
3	20	Item	Closed	05/20/2006	C23900	Parameter Technology	22,959.60
4	31	Item	Closed	08/01/2006	C23900	Parameter Technology	8,649.60
5	37	Item	Closed	09/02/2006	C23900	Parameter Technology	12,688.20
6	49	Item	Closed	11/09/2006	C23900	Parameter Technology	19,080.00
7	58	Item	Closed	12/12/2006	C23900	Parameter Technology	14,628.00
8	60	Item	Closed	01/08/2007	C23900	Parameter Technology	397.50
9	68	Item	Closed	02/06/2007	C23900	Parameter Technology	636.00
10	76	Item	Closed	03/10/2007	C23900	Parameter Technology	28,620.00
11	84	Item	Closed	04/18/2007	C23900	Parameter Technology	10,335.00
12	92	Item	Closed	06/23/2007	C23900	Parameter Technology	7,711.50
13	100	Item	Closed	08/13/2007	C23900	Parameter Technology	1,725.15
14	108	Item	Closed	09/21/2007	C23900	Parameter Technology	588.30
15	116	Item	Closed	11/08/2007	C23900	Parameter Technology	2,067.00
16	124	Item	Closed	12/13/2007	C23900	Parameter Technology	1,788.75
							2,104,060.56


- Run a detailed Sales Analysis Report to uncover purchasing trends.
- Write a custom query to retrieve the top 10 sales orders for in-depth analysis.
- [Use a formatted search on the sales order form \(recommended\).](#)


Unlock Sales Insights with This Formatted Search


This powerful query empowers salespeople by displaying the top 10 items a customer has previously bought, including key details like order dates, current stock levels, and order statuses, enabling more informed suggestions and seamless inventory checks during order entry.

3. Setting It Up

Follow these steps to implement the formatted search in SAP Business One:

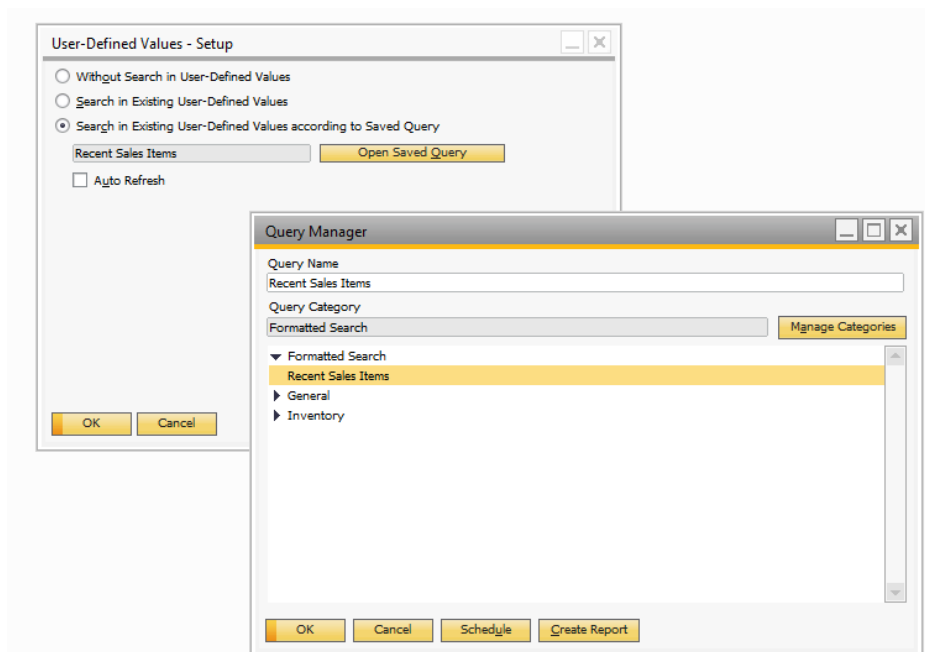
1. Open SAP Business One and go to Tools > Queries > Query Manager.
2. Create a new query and copy the code from the  [GitHub](#) link

 **Tip (1):** The query uses `[$($4.0.0)]` in the `WHERE` clause to filter results based on the Business Partner (BP) code entered in the sales order form's "Customer/Vendor Code" field.

 **Tip (2):** When using SAP Business One with the SAP HANA database, formatted searches require careful attention to syntax differences compared to SQL Server. SAP HANA is case-sensitive, so table and field names must match exactly, often requiring double quotes around them (e.g., `ORDR."DocDate"`).

```
SELECT TOP 10
    T1."ItemCode" AS "Item No.",
    T2."ItemName" AS "Item Name",
    T1."Quantity" AS "Quantity",
    T1."Price" AS "Price",
```

3. Save it as "Recent Sales Items".
4. Open the sales order form by creating a new sales order (Sales – A/R > Sales Order) or editing an existing one.
5. In the sales order form, go to the line items matrix, select the "Item No." field, and press **Shift + Alt + F2** to open the formatted search setup.
6. Assign the "Recent Sales Items" query to the field.



4. Functionality in Action

When you enter a BP code in Sales Order and click the magnifier icon in the "Item No." field, a grid displays the customers top sales items. Selecting items populates the field with its code, streamlining order entry.

The screenshot shows the SAP Sales Order entry interface. At the top, the 'Customer' field is set to 'C23900' (Parameter Technology) and the 'Contact Person' is 'Daniel Brown'. The 'BP Currency' is set to '\$'. The 'No.' field is '1191', 'Status' is 'Open', 'Posting Date' is '05/18/2025', 'Delivery Date' is empty, and 'Document Date' is '05/18/2025'. Below this, there are tabs for 'Contents', 'Logistics', 'Accounting', 'Electronic Documents', and 'Attachments'. The 'Contents' tab is active, showing a table with columns: '#', 'Item No.', 'Item Description', 'Quantity', 'Delivered Qty', 'Unit Price', 'Discount %', 'Tax Code', 'Total (LC)', 'Whse', 'Del. Date', and 'Open Qty'. A magnifier icon is highlighted in the 'Item No.' field. A pop-up window titled 'Recent Sales Items' is displayed, showing a list of items with columns: 'Item No.', 'Item Name', 'Quantity', 'Price', 'Order Date', 'Document Number', 'In Stock', 'Available', 'Order Status', 'Inventory Item', and 'Row Number'. The list includes items like 'Rainbow Color Printer 5.0', 'J.B. Laptop Batteries X1 series', 'Portable Hard Disk 1TB', 'Motherboard BTX', 'Memory Chip', 'Portable Hard Disk 2TB', '1 TB disk for external HD', 'USB Flashdrive 256GB', and 'Motherboard MicroATX'. At the bottom of the pop-up, there are 'Choose' and 'Cancel' buttons. Below the pop-up, there are 'Add & View' and 'Cancel' buttons, and a 'Copy From' / 'Copy To' section.

#	Item No.	Item Description	Quantity	Delivered Qty	Unit Price	Discount %	Tax Code	Total (LC)	Whse	Del. Date	Open Qty
1						0.000					

Item No.	Item Name	Quantity	Price	Order Date	Document Number	In Stock	Available	Order Status	Inventory Item	Row Number
A00004	Rainbow Color Printer 5.0	2.00	750.00	08/06/2016	1178	1,153.00	894.00	Open	Yes	1
I00005	J.B. Laptop Batteries X1 series	8.00	135.00	08/06/2016	1178	1,186.00	966.00	Open	Yes	2
D00001	Portable Hard Disk 1TB	10.00	150.00	08/06/2016	1178	564.00	-203.00	Open	Yes	3
C00001	Motherboard BTX	17.00	600.00	08/06/2016	1178	1,663.00	1,423.00	Open	Yes	4
LM4029MC	Memory Chip	20.00	75.00	08/06/2016	1178	683.00	258.00	Open	Yes	5
D00002	Portable Hard Disk 2TB	7.00	150.00	08/06/2016	1178	488.00	-129.00	Open	Yes	6
C00013	1 TB disk for external HD	15.00	75.00	08/06/2016	1178	848.00	155.00	Open	Yes	7
LM4029MC	Memory Chip	8.00	75.00	08/06/2016	1178	683.00	258.00	Open	Yes	8
I00004	USB Flashdrive 256GB	15.00	45.00	08/06/2016	1171	1,095.00	933.00	Open	Yes	9
C00002	Motherboard MicroATX	2.00	450.00	08/06/2016	1171	1,425.00	1,210.00	Open	Yes	10

5. Conclusion

This formatted search enhances sales efficiency in SAP Business One by providing quick access to a customer purchase history.

Sales Order										
Contents Logistics Accounting Electronic Documents Attachments										
Item/Service Type		Item		Summary Type						
#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Whse	Del. Date	
1	A00004	Rainbow Color Printer 5.0	1	750.00 \$	0.000	PA	750.00 \$	01	05/19/2025	
2	I00005	J.B. Laptop Batteries X1 series	1	135.00 \$	0.000	PA	135.00 \$	01	05/19/2025	
3	C00001	Motherboard BTX	1	600.00 \$	0.000	PA	600.00 \$	01	05/19/2025	
4	LM4029MC	Memory Chip	1	75.00 \$	0.000	PA	75.00 \$	01	05/19/2025	
5					0.000				05/19/2025	

6. About This Document

References and Further Learning:

- [ChatGPT](#)
- [Quintech YouTube Video](#)

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 [Maven Analytics Portfolio](#)

 [GitHub](#)

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