

User Guide

PUBLIC

SAP Business One mobile app 1.9.x for iOS

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SAP Business One mobile app for iOS

Applicable Releases: SAP Business One 9.0 PL04, SAP Business One 8.82 PL12, SAP Business One 9.0, Version for SAP HANA PL00, SAP Business One OnDemand 1.0 PL02, SAP Business One mobile app 1.9.x for iOS

Typographic Conventions

Type Style	Description
<i>Example</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
<code>Example</code>	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER .

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Introduction

With the SAP Business One mobile app for iOS you can process approval requests, view reports and business content, manage business partner data, monitor sales opportunities, and much more.

Key features:

- Sales Catalog - view, search for, compare, and create sales quotation or sales order on the fly for sales items, using visual and appealing display layout.
- Approvals and alerts – Get alerts on specific events – such as deviations from approved discounts, prices, credit limits, approved or rejected documents, or targeted gross profits – and view approval requests waiting for your immediate action. Drill into the relevant content or metric, including draft documents, before making your decision.
- Business partners – Access and manage business partners' information including addresses, phone numbers, and contact details; view historical activities and special prices; create new business partners and new activities; and contact or locate partners.
- Inventory – Monitor inventory levels and access detailed information about your products, including purchasing and sales price, available quantity, product specifications, and pictures.
- Sales documents – Create, view, update, and search for sales quotations and sales orders, and submit drafts of sales quotations and sales orders for approval. In addition, you can create, update, view, and close activities related to sales documents.
- Sales Opportunities - Create, view, and search for sales opportunities; view, add, and edit stages for sales opportunities.
- Service – Process and close service calls, create and view solutions, and look up related service calls from service contracts or customer equipment cards.
- Reports – Refer to built-in reports created with SAP Crystal Reports software, version for the SAP Business One application, that present key information about your business. Add your own customized reports to the app and easily share them via e-mail.
- Dashboards – View predefined dashboards (sales analysis, cash flow, and purchase quotations) in normal and full-screen mode and share them via e-mail.
- Help – Display either a standard or a customer-specific help document.

Requirements for mobile devices:

The iOS in your device is updated to iOS 5.x . SAP Business One mobile app 1.9.x for iOS is not supported by lower versions of iOS.

Requirements for SAP Business One solution:

- You have installed one of the following:
 - SAP Business One 9.0 (PL) 04
 - SAP Business One 9.0, Version for SAP HANA (PL) 00 or higher
 - SAP Business One 8.82 (PL) 12 or higher

i Note

SAP Business One mobile app 1.9.x for iOS is also available when using SAP Business One OnDemand 1.0 (PL) 02. For further information, see the *SAP Business One OnDemand Administrator's Guide*.

i Note

You can use SAP Business One mobile app 1.9.x for iOS with older versions of SAP Business One (such as SAP Business One 8.81) however latest functions introduced in mobile app 1.9.x will not work. When accessing such function, the following message appears: "*Note that this function is not supported by the current version of the backend server.*" All mobile app functions that were supported by the older version of SAP Business One still work.

- Integration component for SAP Business One (B1iC)

i Note

For further information about installing and upgrading SAP Business One, see the *Administrator's Guide* that is provided on the SAP Business One product DVD or in the download package. For security reasons, the SAP Business One mobile app for iOS neither stores nor caches business data on the device. It does not support any offline use. A server connection needs to be established to open and use the app.

While this document is for all users, some links included in this document lead to sites that are restricted to SAP Business One partners who must have a valid username and password to access.

Configuring the SAP Business One Solution

This section explains the tasks of the system administrator in setting up and managing SAP Business One mobile app for iOS. These tasks are performed in SAP Business One or in SAP Business One, version for SAP HANA(PL)01 or higher.

Activating Mobile App Users

To enable SAP Business One users to use the mobile app, make the following settings.

1. From the SAP Business One *Main Menu*, choose *Administration* → *Setup* → *General* → *Users*.
2. In the *Users - Setup* window, specify the user for whom you want to make the mobile settings and select the *Mobile User* checkbox.
3. In the *Mobile Phone* field, enter the user's mobile phone number. For an iPod touch or iPad, where you have no number, choose a fictitious mobile phone number.
4. In the *Mobile Device ID* field, enter the MAC Address of the respective mobile device.

Note

If the *Mobile User* checkbox is selected, this field is mandatory. For more information on how to find the MAC Address, consult the product documentation supplied with your Apple device, ask your vendor, or search for instructions on the Web.

As a result of changes made by Apple in the iOS, when using iOS 7.0 or higher, make sure to enter the value 02:00:00:00:00:00 in this field.

5. To enable a user to use the app by two different mobile devices, enter the MAC address of both devices. Use "/" as the separator. For example: 3C:07:54:4C:7E:79 / 64:20:0C:16:86:BF.

Note

It is possible to logon to one mobile device at a time. If a user tries to log on to one device while logged on to the other device, a warning appears and the session automatically ends.

6. Choose the *Update* button and then choose *OK*.

Note

If you are working with SAP Business One OnDemand 1.0, choose the *Send Mobile Settings* button. An e-mail with a hyperlink containing all configuration details will be sent automatically to the mobile device of the given user. For more information see the *Configuring Mailer* and *Registering Integration Components* sections in the *SAP Business One OnDemand Administrator's Guide*, and the *Configuring the SAP Business One App when Working with SAP Business One OnDemand* section in this guide.

Setting Up License

If you have created a new user with mobile settings or added mobile settings to an existing user, a message appears reminding you to ensure that the mobile user has a B1i license.

SAP Business One mobile app for iOS is available for the following SAP Business One named user types with no additional license fee:

- Professional
- Limited Financial
- Limited Logistics
- Limited CRM
- Starter Package
- CRM Sales User (standalone, legacy license type)
- CRM Service User (standalone, legacy license type)

For more information about the mobile app functions available for each license type see the *Mobile App Function Availability Based on SAP Business One License Type* section in this document.

To assign a user a B1i license, follow the steps below.

1. From the SAP Business One *Main Menu*, choose *Administration → License → License Administration*.
The *License Administration* window appears.
2. In the *Allocation* tab, first select the relevant users and then select the *Used* checkbox for the *B1i user* type license.
3. Choose the *Update* button.

Configuring for SAP Crystal Reports

To make a report created with SAP Crystal Reports visible within the mobile app, follow the steps below.

1. From the SAP Business One *Main Menu*, choose *Administration → Setup → General → Report and Layout Manager*.
2. In the navigation pane on the left, select the report you want to display on the mobile device.
3. Select the *Visible for Mobile* checkbox.

This checkbox is visible only for reports in the SAP Crystal Reports format, not for reports in other formats.



Caution

SAP Business One does not check whether the report is suitable for displaying on a mobile device.

4. To save your settings, choose *Update*.



Note

The resolution of the mobile device determines how the report is displayed. For example, iPhone 4 currently supports a resolution of 960x640 pixels, while the iPad supports 1024x768 pixels

Configuring for SAP Crystal Reports Deployed on SAP Business One analytics powered by SAP HANA

This procedure is relevant only if you are using SAP Business One analytics powered by SAP HANA and would like to enable viewing in the mobile app SAP Crystal reports which are deployed on SAP Business One analytics powered by SAP HANA.

1. Open the report in the SAP Crystal Reports for SAP Business One designer. In the *Data* area → *Available Data Sources*, choose either the HDBODBC connection for 64 bit, or HDBODBC32 for 32 bit.
2. Select the *Enter Connection String* radio button, and in the *Connection String* field enter the name of the target company data base as schema in command, or import the table from the target company database.



Example

Connection String: **DRIVER=**

```
{HDBODBC32};UID=SYSTEM;PWD=Password;SERVERNODE=192.168.1.4:30015;DATABASE=SBODEMO;
```

Command: **SELECT "ItemCode", "ItemName" FROM "SBODEMO"."OITM"**

3. Repeat the above steps for each target company database.

Configuring for SAP Crystal Reports Based on SAP HANA

This procedure is relevant only if you are using SAP Business One 9.0, version for SAP HANA PL02 and SAP Business One mobile app 1.9.3 for iOS, and would like to enable viewing in the mobile app SAP Crystal reports based on SAP HANA.

1. Open the report in the SAP Crystal Reports for SAP Business One designer. In the *Data* area → *Available Data Sources*, choose either the B1CRHPROXY connection for 64 bit, or B1CRHPROXY32 for 32 bit.



Note

If HDBODBC or HDBODBC32 is used as connection, replace it by B1CRHPROXY or B1CRHPROXY32 respectively.

2. Select the *Enter Connection String* radio button, and in the *Connection String* field remove "Schema@" and "Package@" from all the parameters of commands and tables if exist.



Example

Connection String: **DRIVER**

```
{B1CRHProxy32};UID=SYSTEM;PWD=Password;SERVERNODE=192.168.1.4:30015;DATABASE=SBODEMO;
```

Command: **SELECT "ItemCode", "ItemName" FROM "OITM"**

3. Repeat the above steps for each target company database.

Setting Up Add-Ons to Run Within the Mobile App

For SAP Business One add-ons that run on mobile devices and are delivered by partners, make the settings described below.

1. From the SAP Business One *Main Menu*, choose *Administration* → *Add-Ons* → *Mobile Add-On*.
2. In the *Mobile Add-On - Setup* window, enter the relevant data in the *Add-On Code*, *Add-On Name*, *Add-On URL*, and *Add-On Provider* fields.
3. In the *Add-On Type* field, specify whether the add-on will be accessed from the *Home* tab or from the *Modules* tab on the iPhone (equivalent to Home tab and vertical modules menu in the menu section on left side of the iPad).
4. To save your settings, choose *Update*.

More Information

See the guide *How to Create Add-Ons for the SAP Business One Mobile Application for iPhone* located at <http://sappartneredge.com/b1/innovations>, where you can also find sample code.

Configuring the SAP HANA Server

Note

This section is relevant only when working with SAP Business One, version for SAP HANA.

1. In the *Integration Solution for SAP Business One page*, choose: *SLD* → *B1i Server* → *B1A Server*. The *B1A Server* area appears. Choose the *Edit* button.
2. In the *HTTA* section (under *Connectivity List (Active)*), enter in the following fields (all of them are mandatory) the respective details as appear in the B1A Server:
 - o *destProtocol*
 - o *destHost*
 - o *destPort*

Example

The URL for accessing the B1A Administration Console is: <https://10.58.114.44:8443/Enablement> the above mentioned fields are filled in as follows:

- o *destProtocol* → **https**
 - o *destHost* → **10.58.114.44**
 - o *destPort* → **8443**
3. Choose *Save*.

Configuring for SAP Business One analytics powered by SAP HANA

Note

This section is relevant only when working with SAP Business One analytics powered by SAP HANA. Follow the steps below to enable viewing in the mobile app SAP Crystal Reports deployed on SAP Business One analytics powered by SAP HANA.

1. In the *Integration Solution for SAP Business One page*, choose: *SLD* → *B1i Server* → *B1A DB*. Choose the *Edit* button.
2. In the *Connectivity List (Active)*, update the JDBC information as follows:
 - o *Driver*: com.sap.db.jdbc.Driver
 - o *URL*: jdbc:sap://<B1A SERVER>:30015?currentschema=<SCHEMA>;databaseName=<DBNAME>;
 - o *Username*: <Your HANA DB user code>
 - o *Password*: <Your HANA DB password>
3. Choose *Save*

Activating the B1i Mobile Scenario

After completing setup and configuration tasks in SAP Business One and on your iOS device, you must activate the B1i scenario. This enables the SAP Business One mobile app to communicate with the SAP Business One database and vice versa.

1. On the B1i server, choose *Start* → *All Programs* → *Integration Solution for SAP Business One* → *Integration Framework*.
The *Connect to <server name>* window appears.
2. In the *User name*: field, enter **B1iadmin**; in the *Password*: field, enter the password that was set by the user when installing B1i. Choose the *OK* button.
The *Integration solution for SAP Business One* window appears.
3. Choose the *Scenarios tab* → *Control*. In the *Scenario List*, select the *sap.B1Mobile* checkbox.
4. In the *Integration framework – Scenario Setup Result* screen, choose the *Activate* button.
After a few seconds, a system message appears, announcing that preparations are finished and asking whether you want to activate the scenario.
5. To activate the scenario, choose the *OK* button.
After few seconds, a confirmation message appears.
6. To complete the activation process, choose the *OK* button.

Installing the SAP Business One App

To download and install SAP Business One mobile app for iOS on your iOS device, go to Apple App Store and search for SAP Business One. You can also follow this link <http://itunes.apple.com/app/sap-business-one-mobile-application/id392606876> or use the QR code:



When you tap the app icon on your iOS device, one logon field of *Password* or two logon fields of *User Code* and *Password* appear, depending on your settings. For more information, see the explanation of the *User Code* field in *Configuring the SAP Business One App*.

i Note

The *SAP Business One* start icon shows the total number of unread alerts and unread approvals. This counter is updated only when you leave the app. There is no push or notification service for new alerts and approvals.

Configuring the SAP Business One App

To connect to your SAP Business One company database, follow the steps below.

1. Tap *Settings* on your iOS device
2. On the *Settings* page, tap *Business One*.
3. On the *Settings* page for SAP Business One, specify the following information:
 - o *Server*: Server address and port (either IP or server name) in the format **<server>:<port>**. Default ports of integration solutions for SAP Business One are 8080 (http) and 8443 (https). If you enter an incorrect port for a server connection, the app times out in 75 seconds by default.
 - o *SSL*: To use SSL (https) between SAP Business One and your iOS device, choose *ON*.
This setting must comply with the protocol and assigned ports on the server side.

Recommendation

Use a secure communication channel. For SSL, keep as *ON*, which is the default value.

Note

For more information about configuring https, see the *Security Aspects Related to the Mobile Solution* section in *Administrator's Guide for the Integration Component*.

Be aware that SAP cannot cover all possible security aspects due to customer-specific requirements and conditions. The mobile app needs to be embedded into each customer's specific security concept.

- o *Company DB*: Name of the company database to which you want to connect (mandatory field). The mobile app logs on to this company. For details about the company database concept in SAP Business One mobile app for iOS, see SAP Note [1606567](#) (in the Get Support area of SAP Business One Customer Portal at <http://service.sap.com/smb/sbocustomer>.)
- o *User Code*: Used to log on to the SAP Business One company database specified in the Company DB field; that is, the value in the *User Code* field of the *Users - Setup* window in SAP Business One
 - o If you do not specify a user code in this field, when you log on to the app you must enter your user code and password.
 - o If you specify a user code in this field, when you log on to the app you need to enter only your password.
- o *Phone Num*: User's mobile phone number; that is, the value in the *Mobile Phone* field of the *Users - Setup* window in SAP Business One
- o *Demo System*: When the demo system is *ON*, the logon dialog offers the user access to the public demo system. For best performance in China, set the demo server to *China* (in *Device Settings* → *Business One* → *Demo Server* field)

Note

The app uses the language that you use on your iOS device. All SAP Business One languages are supported.

Configuring the SAP Business One App when Working with SAP Business One OnDemand

1. In your iOS device, open the e-mail you have received from SAP Business One administrator. Click the hyperlink that appears in the e-mail.
2. SAP Business One app reads and saves the relevant information in the *Settings* page in the iOS device.
3. The *Choose Company* page appears. Choose the required company database. In the next log on, this company will be chosen by default.

Using the SAP Business One App

Choosing a Company

In the first log on, the user is connected by default to the company database defined in the *Company DB* field (see the *Configuring the SAP Business One App* section in this document).

When logging on for the second time and on, you can choose to which company database to log on. To do so perform the following steps:

1. In the logon page tap the "Choose Company" button to show the list of available company databases. The default company database is indicated by ✓.

Note

If you are using iOS 6 and prior, in the logon page, tap .

2. Tap the company database you want to log on to and tap *OK*.

Note

After logging on to a different company database, the value in the *Company DB* field (see the *Configuring the SAP Business One App* section in this document) is updated to the newly selected company. The selected company database becomes the default company database until you choose to log on to different company database, or manually change the company database name in the *Company DB* field.

Starting Page

Note


- o After you log on to the mobile app, the starting page appears.
- o For the first logon, the Home tab page appears. For subsequent logons, the page where you logged off appears.
- o If you change settings and then go back to the mobile app, a warning message appears in a pop-up window informing you that settings have changed and that you have to log on to the app again. The app forces you to log out.
- o If the app is idle for a period of time, a logon box appears, and you have to log on to the app again. By default the idle time is ten minutes. To change this value:
 1. Open the integration framework Web page and choose *Scenarios → Authentication*.
 2. From the *User Def. Author. Identifier* dropdown list, choose *sap.B1Mobile*.
 3. In the *Session Timeout* field, specify a value. If you enter an incorrect port for a server connection, the app times out in 75 seconds by default.
 4. Choose the *Save* button.

You can access all functions of the mobile app from the starting page, which is divided into the following areas:

- The toolbar contains menu commands, such as the *Back* button and the *Edit* button.

- The page section displays real-time information, such as key performance indicators and alerts.
- For iPhone: A horizontal tab section consists of two tabs: Home and Modules. You can tap them at any time.
- For iPad: On the left side of the screen is a vertical menu section; on the right side in the content area is the display section for selected content.

Home Page


In the tab section (iPhone) or menu section (iPad), tap Home. On the Home screen, every page has a jump  button on the top-right of the screen, which provides *Set Default Help* (on iPhone only) and *Log off* (on iPhone only):

- To set a page as default, choose *Set Default*. This takes effect the next time you log on.
- To display a help document, choose *Help*.
- To log off the system and the pop-up logon dialog, choose *Log off*.

Note

You can create add-on pages for the *Home* tab, such as a gauge that shows the percentage by which the revenue deviates from the target. For more information, see the guide *How to Create Add-Ons for the SAP Business One mobile app for iOS* located at <http://sappartneredge.com/b1/innovations> where you also find sample code and a gauge.

The *To-Do List* page displays a maximum of the next eight activities (iPhone) or next twelve activities (iPad) in your SAP Business One calendar.

- To see details or to edit an activity, tap the activity.
- To synchronize the activities in the most recent three months (last month, this month, and next month) into the calendar of your mobile device, choose *Sync to Calendar* from the  button. These activities will be synchronized into a separate calendar in the mobile device named "SAP Business One". The first time you use this function within a month, full synchronization is done. During that month, whenever you use this function again, only the changed activities are synchronized.

The *Key Performance Indicators* page displays system and user-defined KPIs:

- System-defined KPIs:
 - *Sales Order* displays data for the current month and the previous month, together with the percentage change.
 - *Incoming Payments* displays data for the current month and the previous month, together with the percentage change.
 - *Outgoing Payments* displays data for the current month and the previous month, together with the percentage change.
 - *Cash on Hand* displays the balance of the account in the *Cash on Hand* field on the *General* subtab of the *Sales* tab of the *G/L Account Determination* window in SAP Business One. To define this account, choose *Administration* → *Setup* → *Financials* → *GL Account Determination* → *Sales* → *General* → *Cash On Hand*.
- User-defined KPIs: You can create your own KPIs by defining customized user-defined queries in SAP Business One.

Note

Your KPI queries need to be categorized and start with 'KPI_' as the prefix.

Each query requires seven selected fields with the following sequence:

Main Title - Growth Rate - Indicator* - SubTitle1 - SubValue1 - SubTitle2 - SubValue2

These seven items are displayed like this:

Main Title - Growth Rate - Indicator	
SubTitle1	SubValue1
SubTitle2	SubValue2

Possible values for indicator are P (positive) and N (negative):





Arrow	Indicator	Growth Rate
Green up	P	≥ 0
Red down	P	< 0
Red up	N	≥ 0
Green down	N	< 0

Managing Modules

The Modules tab (iPhone) or modules menu (iPad) displays two separate groups: twelve SAP-provided modules and optional user-defined modules. You can display your favorite SAP-provided modules, add or remove user-defined modules, and change the display sequence of modules.

To display your favorite SAP-provided modules, choose [Add/Remove Modules](#). A list displaying all the SAP-provided modules appears. Tap the ones you would like to remove from your list of modules.

To add or remove user-defined modules choose the [Add-Ons](#) tab:

- To delete a user-defined module, tap  in front of it, and then tap [Delete](#). To cancel a deletion, tap . You can add back deleted user-defined modules at any time.
- To add a user-defined module:
 1. On the left of the toolbar, tap .
 2. Tap the module that you want to add.
 3. On the right of the toolbar, tap [Save](#).
- To change the display sequence of modules, choose  on the right of the module that you want to move, and drag it to the required position. To return to [Modules](#), tap [Done](#).

Note

You cannot mix SAP-provided modules and user-defined modules; that is, you can move SAP-provided modules only among SAP-provided modules and user-defined modules only among user-defined modules.

You can create additional modules according to your needs. For more information, see the guide [How to Create Add-Ons for the SAP Business One mobile app for iOS](#)

located at <http://partneredge.sap.com/b1/innovations>.

For SAP-provided modules the app uses the function-level authorization settings maintained in SAP Business One. No new configuration is needed. The [Alert](#) and [Approval](#) modules do not require function-level authorization

and are accessible by all users that are enabled to work on a mobile device. For more information about authorizations, see *Function-Level Authorizations for Users to Work with the App*.

Searching in the Mobile App

You can search for specific document, business partner, item, and other data that exist in your SAP Business One company database within the mobile app. The search option is available if the search box appears. For example, when you tap the *Service Call* module, the list of service calls is displayed. The search box appears at the top of the page.

You can search by for documents and records using the fields listed below for the different modules:

- Business Partners: Business Partner Code, Business Partner Name
- Inventory module: Item No., Item Description
- Sales Opportunities: Opportunity Name, Opportunity No., Business Partner Code, Business Partner Name
- Sales Quotation: Business Partner Code, Business Partner Name, Item No., Item Description, Doc No.
- Sales Order: Business Partner Code, Business Partner Name, Item No., Item Description, Doc No.
- Service Contract: Customer Code, Customer Name, Item No., Item Description
- Service Call: Subject, Customer Code, Customer Name, Item No., Item Description, Serial Number, Contract No.

To perform a search, follow the steps below.

1. Tap the search box.
The keyboard appears.
2. Enter a value for the search term. For example, if you are searching for a sales order, you can enter the code or name of the business partner, for whom the sales order was created, or the code or description of the item for which the sales order was created.
3. Tap the **Search** key in the keyboard.
The list of matching results appears.

Note

To fine-tune the results, repeat the steps above, using a more accurate search term.

Note

When initiating a search on a filtered list, the search applies to the filtered list only and not to all of the records that exist in the specific module.

Using the Enterprise Search

Note

This option is only available for SAP Business One, version for SAP HANA, and SAP Business One, Analytics powered by SAP HANA 1.1 PL02 (used with SAP Business One 8.82 PL13 or SAP Business One 9.0 PL06) and only on iPad devices.

1. Tap the search box.
The keyboard appears.
2. Enter a value for the search term and tap the `Search` key in the keyboard.
3. The Enterprise Search page appears, displaying the matching results.
4. Tap on each of the following result types to view the respective module:
 - o Business Partner
 - o Inventory
 - o Sales Opportunity
 - o Sales Quotation
 - o Service Solution
 - o Service Call

The *Enterprise Search* page remains open in the background. To return to the *Enterprise Search* page, tap the yellow ribbon at the top of the screen.

5. To close the *Enterprise Search* page, tap *Close*.

Recommendation

For more information see the *Enterprise Search* section in the *SAP Business One, Version for SAP HANA User Guide*.

Working with Sales Catalog

Note

The *Sales Catalog* module is available only on iPad devices.

The *Sales Catalog* module enables you to:

- View images and details of sales items
- Compare features of different items
- Add selected items to shopping cart
- Create sales quotation or sales order directly from within the shopping cart

Launching the Sales Catalog



1. To view items through the *Sales Catalog*, tap the *Sales Catalog* module. The *Sales Catalog* page appears.
2. The images of the items are displayed as decks of cards; the first deck named *Featured* contains all of the items that are currently in campaign if exists. Each additional deck represents one item group. The *Sales Catalog* page can display up to six groups. If there are more groups defined for the company, they would appear on the next pages. To view additional item groups, swipe to the next page.

Each card deck displays the three most sold items during the last three months of the respective item group. In case such statistics is not available for a specific item group (this can happen if no items from the given

item group were sold in the last three months), the items of the specific item group are displayed and sorted according to the item number.

Note

Only items that are defined as *Sales Item* and have an image attached in *Remarks* tab in the *Item Master Data* window are represented in the *Sales Catalog* page. Alternatively, you can store the images of the items in folder defined in: *Administration* → *System Initialization* → *General Settings* → *Path tab* → *Pictures Folder*. The image name should be: <item no.>.png. To view items of a specific item group, tap the image of the item that appears on the required item group. This item is displayed on the whole page, providing some specific details, while thumbnails of the other items from that item group are displayed horizontally at the bottom of the page. The items that are currently in campaign appear with a yellow ribbon on right-top corner of the image. The thumbnail of the currently displayed item is highlighted. To view a different item of the same item group, tap its thumbnail.




3. To close the *Sales Catalog* page tap 
4. To reset the sales catalog, tap 

Searching for Items in the Sales Catalog

You can search for items in the *Sales Catalog* page by item code, item description, and remarks.



Comparing Items in the Sales Catalog

You can compare characteristics and features of selected items from a given item group, view the results and make an educated decision accordingly. For example, you can compare three different models of televisions, coffee tables and more. To compare items follow the steps below:

1. In the *Sales Catalog* page tap the group whose items you want to compare. Tap 
2. By default, a comparison of the three most sold items is displayed. A list of items from the given item group is displayed at the side of the page. The compared items are selected and appear at the top of the list. To initiate a comparison of other items from that group, long-tap and drag the required item from the list to one of the images of the currently-compared items.
3. The comparison applies to the following parameters:
 - o *Image*
 - o *Item Name*
 - o *Length, Width, Height, Volume, Weight*
 - o *User-Defined Fields* - only user-defined fields set to the category *Catalog* and defined as *Visible* are considered.
4. You can rate the different parameters in the compared items using a scale of one-to-five stars. To rate a certain parameter of a given item, long-tap the parameter. The different ratings assigned to each parameter are summed up and the total number of stars assigned to a given item appears on the item image. Within a quick look you can tell which item is the top-rated one.
5. To add the top-rated item to a shopping cart tap 
6. To empty the comparison list, tap  and then confirm the warning message.


Working with Shopping Carts

You can add items from the sales catalog to a shopping cart. The shopping cart is saved as a list, and is not reflected in accounting or inventory management. The shopping cart is a preliminary stage in the sale and when the time comes, it can be processed in to sales quotation or sales order.

1. On the *Sales Catalog* page tap the relevant item group. The image of the first item is displayed, and the other items of the same group are available as thumbnails.
2. To add the currently displayed item to a shopping cart, tap .
3. The item is added to the shopping cart and a red dot with number appears on the shopping cart icon  indicating that there is certain number of items in the shopping cart.

Adding a Sales Quotation or Sales Order Based on a Shopping Cart

To create sales quotation or sales order based on a shopping cart follow the steps below:

1. On the *Sales Catalog* page tap  a list of the items added to the shopping cart is displayed.
2. Use the + and - signs to adjust the quantity of the different items, or type the required quantity
3. To create a sales quotation for the listed items, choose the *Add as Quotation* button, to create a sales order, choose the *Add as Order* button.
4. A page of the chosen sales document appears; assign the relevant business partner to the document. The list of items and quantities specified in the shopping cart is added to the document. Make the required adjustments and add the document.

Working with Documents in the Approvals Module



In the *Approvals* module, you can:

- View documents in the approval process sorted by date or by type
- Approve or reject documents in the approval process

Note

In the *Modules* tab, the number on the right of the *Approvals* module indicates the number of documents that need your approval.

Within the list of documents, you can:

- Update the list of documents by tapping 
- Hide documents you have already viewed by shaking your mobile device
- Unhide documents by tapping  again

Approving or Rejecting Documents

1. In the *Modules* tab, tap *Approvals*.
A list of documents appears. The list can contain a maximum of 50 documents. To change the way documents are listed, tap *by Date* or *by Type*.
2. Tap the document that you want to approve or reject.
The *Approval Info* page appears. To view the details of the document draft sent for approval, tap the *Doc. Type* field. The *Draft Detail* page appears, displaying the document draft. Tap *Back*.
3. Tap *Approve* or *Reject*.
The *Approve* window appears.
4. Enter your remarks (optional).
5. To continue, tap *Cancel*, *Approve*, or *Reject*.

Note

To stop the process, tap *Cancel*.

The message *Approved successfully* or *Rejected Successfully* appears, in addition a respective alert is sent to the user submitted the draft document for approval:


- o Request approved - the user can tap the alert, view the details of the draft document that was originally submitted for approval, and add it.
- o Request rejected - the user can tap the alert, view the remarks entered by the approver (if available) and the details of the draft document that was originally sent for approval.

Viewing Alerts in the Alerts Module


In the *Alerts* module, you can view real-time alerts from SAP Business One.

Note

In the menu, the number on the right of the Alerts module indicates the number of new alerts. In the alert list, unread alerts are marked as bold.

1. In the *Modules* tab, tap *Alerts*.
2. A list of alerts appears. A maximum of the most recent 50 alerts is displayed. To change the way documents are listed, in the tool bar tap *by Date*, *by Prio*, or *by Type*. To update the list of alerts, tap .

Note

To hide the alerts you have viewed, shake your device. To unhide the viewed alerts, tap .

3. Tap the alert that you want to view.
The *Alert Info* page appears. You can tap fields for more information, for example, information of the item in stock. In case the alert refers to a document that was sent for approval, you can tap the alert and view details of the draft document. If the document is approved, you can add it by tapping *Add* in the *Draft Detail* page. A system message asking whether to generate a document from the draft appears. To add the document, tap *Ok*.

Note

For user-defined alerts, if there is more than one alert, tap the up or down arrow to view the information of another alert.

4. To return to the list of alerts, tap *Alerts*.





Managing Reports in the Reports Module

In the *Reports* module, you can generate reports, send reports by e-mail, add and delete reports, and change the display sequence of the reports.

Generating Reports

1. In the *Modules* tab, tap *Reports*.
The list of available reports appears. If a report contains selection criteria a special indicator appears next to the report name.
2. Tap the report that you want to generate.
3. If the report requires entering selection criteria, the *Selection Criteria* page appears. Tap a parameter to specify the required value. Then tap *Done* to return to the *Selection Criteria* page. Repeat this step until all selection criteria parameters are specified.
4. The chart and detailed information in the report appear. You can zoom in and out by either pinching or double-tapping. To change the orientation between portrait and landscape, rotate your device.
5. To return to the list of reports, tap *Reports* (in iPad, tap *Done*).

Deleting, Adding, and Changing the Display Sequence of Reports

1. In the *Modules* tab, tap *Reports*.
The list of available reports is displayed.
2. Tap *Edit*.
 - o To delete a report, tap  in front of it, and then tap *Delete*. To cancel the deletion, tap .
 - o To add either a new report or a report that was deleted:
 1. Tap .
 2. Tap the report that you want to add.
 3. Tap *Save*.
 - o To change the display sequence of reports, choose  near the report that you want to move and drag it to the desired position.
3. To return to the *Reports* page, tap *Done*.


Sending Reports by E-Mail

Note

To send a report, an e-mail account for the user of the mobile device has to be configured on the mobile device.

1. Display the report you want to send (see *Viewing Reports*).
2. Tap *Send*.

The *New Message* page appears with the report already attached to the message body as a PDF.

3. In the *To* or *Cc/Bcc* field, enter one or more names or e-mail addresses. Alternatively, to add a contact's e-mail address, tap  and choose a contact.
4. Enter a subject and a message (optional) and tap *Send*.

Managing Business Partner Data in the Business Partners Module

In the *Business Partners* module, you can filter, view, update, add, and search for business partner information.

Filtering Business Partners

You can filter the list of business partners in the *Business Partners* module according to business partner types.

Tap a filter to view list of business partners of the respective type:

- *Lead* - applied by default. Displays list of business partners of type *Lead*.
- *Customer* or *Vendor* - to display only business partners of type *Customer* or *Vendor*
- *All* - to display all the existing business partners, of all types: *Lead*, *Customer*, and *Vendor*.

The filter you apply is kept by default for the next time you enter to the *Business Partners* module.

For example, if you applied the filter *Customer*, the next time you access the *Business Partners* module, the list of business partners will consist of business partners of type *Customer* only.

Note

When initiating a search after applying a filter, the search applies to the filtered list. For example, if you applied the *Customer* filter and then initiated a search, the search applies to business partners of type *Customer* only.

Viewing Business Partner Information

1. On the *Modules* tab, tap *Business Partners*.

A list of business partners sorted alphabetically by business partner name appears. By default, the first 25 business partners appear. To view the next 25 business partners, tap [Load More...](#) at the bottom of the list. To refresh the list, use your finger and drag it from the top of this list.

Note

The list has an index along the right side. To jump to business partner whose name starts with a specific letter, tap that letter. To scroll quickly through the list, drag your finger along the index.

2. To view information about a business partner, tap the business partner.



The BP Info page appears. It includes the following tabs:

- o [General](#) – Displays the account balance and credit limit of the business partner, as well as contact details for the company, such as phone number, e-mail address, and Web site.

Note

In Brazilian companies who activated the multi-branch functionality the BP branch is displayed as well.

Note

- o Users of SAP Business One, version for SAP HANA who have iPad devices can view in the [General](#) tab pervasive analysis information for the business partner. For more information, see *Pervasive Analysis* section in the *SAP Business One, Version for SAP HANA User Guide*. Any user-defined fields are displayed on this tab in a separate section.
- o [Addr/Contacts](#) – Displays the default contact person and the default ship-to and bill-to addresses.
- o [Transactions](#) – Tap the relevant category to view the documents or transactions created for the business partner:
 - o [Activities](#) – Displays the list of activities created for the business partner
To view an activity, tap it.
The [Activity Detail](#) page appears. To edit the activity, on the right of the toolbar, tap [Edit](#) and make changes. To save your changes, on the right of the toolbar, tap [Save](#).
To add an activity, on the right of the toolbar, tap  .
The [Add Activity](#) page appears. Specify the information and on the right of the toolbar, tap [Save](#).
 - o [Special Price](#) – Displays the special prices of items for the business partner. To view item information, tap the item. From the item display, tap Unit Price to view the item's price in various price lists.
 - o [Opportunities](#), [Sales Quotations](#), and [Sales Orders](#) – Display, respectively, the sales opportunities, sales quotations, and sales orders created for a business partner. To create a new opportunity, sales quotation, or sales order, tap  . To return to the list of business partners, on the left of the toolbar, tap [Back](#).




Editing Business Partner Information

1. Display the business partner whose information you want to edit (see *Viewing Business Partner Information*).
2. Tap [Edit](#).
The [Edit BP](#) page appears.
3. Tap any detail you want to edit, make the required change, and then tap [Done](#).

For example, to change the business partner name, tap *BP Name*. Enter the new name in the text box and then tap *Done*.

4. To change the main contact for the business partner, tap *Main Contact*.

The list of contacts defined for the business partner appears:

1. To add a contact, tap , specify the information, and tap *Done*.
2. To edit an existing contact, tap , make the changes, and tap *Done*.
3. To select an existing contact person as the default contact person for the business partner, tap the name of the contact person. A  appears in front of the name.
5. To change a bill-to or ship-to address, follow the same options as for changing the main contact.
6. In Brazilian companies who activated the multi-branch functionality: to change the currently displayed branch, tap the *Branch* field. A list of the existing branches appears. Select the required branch, and tap *Done*.
7. After making your changes, tap *Save*.

Adding Business Partners

1. On the *Modules* tab, tap *Business Partners*.

The *Business Partners* page appears.

2. Tap .

The *Add BP* page appears.

3. Specify the information and tap *Save*.

Viewing Items in the Inventory Module

In the *Inventory* module, you can:

- View information about items in inventory, including a picture and unit price of a selected item
- View quantities of an item by warehouse
- Search for items in inventory (follow the steps in *Searching in the Mobile App*)

Viewing Information about Items in Inventory

1. On the *Modules* tab, tap *Inventory*.

The list of items is displayed sorted alphabetically by item code. By default, the first 25 items appear. To view the next 25 items, tap *Load More...* at the bottom of the list. To refresh the list, use your finger and drag it from the top of this list.

Note

The item list has an index along the right side. To jump to items whose item code starts with a specific letter, tap that letter. To scroll quickly through the list, drag your finger along the index.

2. To view information about an item, tap the item.

The Item Info page displays detailed information about the item, including user-defined fields.

- o To view the item picture, tap the placeholder picture.
- o To view the price of the item in various price lists, tap *Unit Price*.
- o To view inventory levels of the item by warehouse, tap *In Stock Qty*. For each warehouse, you see the quantity of the item in stock, committed, ordered, and available.

Viewing Price Lists in the Price Lists Module

In the *Price Lists* module, you can view the price lists as defined in your SAP Business One company database and search for specific items within a given price list.

Viewing Price List Details in the Price Lists Module

1. On the *Modules* tab, tap *Price Lists*.

The *Price Lists* page appears, listing all the price lists that exist in your SAP Business One company database.

2. To view the prices defined in a specific price list, tap the relevant price list.

The *<price list name>* page appears. The selected shows a list of items sorted alphabetically by item code with their prices. By default, the first 20 items appear. To view the next 20 items, tap *Load More...* at the bottom of the list. To refresh the list, use your finger and drag it from the top of this list.

Note

The list has an index along the right side. To jump to an item whose code starts with a specific letter, tap that letter. To scroll quickly through the list, drag your finger along the index.

3. To return to the *Price Lists* page, tap *Back*.

Searching for Items in Within a Price List

To search for a specific item within a given price list, follow the steps described in *Searching in the Mobile App*.

Managing Sales Documents in SAP Business One Mobile App

You can view, search for, and create sales quotations, and sales orders, as well as submitting drafts of sales quotations and sales orders for approval, by using the relevant module:

- *Sales Quotation* module
- *Sales Order* module

In addition, you can update existing sales quotations and sales orders and manage activities related to these documents.

Viewing Sales Document Information

1. On the *Modules* tab, tap the relevant module.

A page listing the existing sales documents of the selected module appears. The sales documents are sorted in descending order by document number. By default, the 20 most recent documents are displayed. To view the next 20 documents, tap *Load More...* at the bottom of the list. To refresh the list, pull down the list at the top of the list.

Note

Sales documents with a status of *Open* have an orange side bar in the front of the sales document.

2. To view information about a sales document in the list, tap the sales document.
 - o For sales opportunities, the *Opportunity Info* page displays opportunity details such as business partner, status, stage, and so on.
 - o The Info page for sales order and sales quotation contains four tabs: *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:
 - o *Header* tab – Document number, currency, sales employee, status, business partner details, dates, total values, and user-defined fields, if any exist
 - o *Contents* tab
 - For an item type document:
 - Each row has a summary row on this tab, including item description, item code, quantity, unit of measure, items per unit, and user-defined fields if exist. To view row details, tap the row. The *Details* page appears.
 - To view detailed information of the item, tap *Item*. The *Stock Info* page appears.

Note

When using SAP Business One, version for SAP HANA and in iPad devices only, you can preview the delivery schedule for items in sales orders. To preview the delivery schedule of the selected item, tap *Schedule*. The *Schedule Delivery* page appears. Then tap *Preview*. To confirm or apply the changes made, tap *Done*. To return to previous page or cancel changes, tap *Cancel*. For further information see the *Scheduling Deliveries* section in the *SAP Business One, Version for SAP HANA User Guide*.

For a service type document:

Each row in the sales order has a summary row on this tab, including description, line total, and user-defined fields if exist. Line total is displayed in document currency. To view row details, tap the row. The *Details* page appears.

- o *Logistics* tab – Bill-to and ship-to addresses and shipping type, if defined. To see a map and get directions, tap the relevant address.
- o *Accounting* tab – Payment terms and payment means defined for the document, as well as the BP project.

Updating Sales Documents


You can update existing sales quotations and sales orders that comply with the following conditions:

- The sales quotation or sales order is in status *Open*
- The sales quotation or sales order was not fully or partially drawn into target document
- The sales quotations or sales order is not subject to approval procedure

Procedure

1. Display the sales quotation or sales order you need to update
2. Tap *Edit*. The document is switched to *Edit* mode.
3. Make all the changes required.

Note

When editing the Items page, you can check the available quantity of the different items, In the *Quantity* field tap . The *Inventory by Warehouse* page appears, displaying the total available, in-stock, ordered, and committed quantities in all warehouses, as well as in each warehouse separately. To return to the Items page, tap *Back*

4. To save your changes, tap *Save*, otherwise, tap *Cancel*.

Note

The following values cannot be modified:

- Customer code and customer name
- Document currency

Searching for Sales Documents

To search for specific sales document, follow the steps described in *Searching in the Mobile App*

Filtering Sales Quotations and Sales Orders

You can filter sales quotations and sales orders to view only documents with status *Open*, documents created by you, or to view all the existing documents.

To filter the view of existing documents, choose the *Sales Quotations* or *Sales Orders* module. A list of the respective documents appears:

- To view only documents created and owned by you, choose *My*.

Note

This option is available only if the current user, who is logged on to the app, has an employee master data record that is linked to the current user code.

- To view only documents with status *Open*, choose *Open*.

- To clear the filter and display all documents, choose *All*.

Note

When initiating a search after applying a filter, the search applies to the filtered list, and not to all existing documents.

Managing Activities for Sales Documents


You can view, add, and close activities related to sales quotations and sales orders.

Viewing Activities Related to Sales Documents

1. Display the relevant sales quotation or sales order and choose the *Header* tab.
2. Tap *Activities*.
3. A list of all the activities created for the displayed document appears. Closed activities appear in gray. Tap an activity to view its details.

Adding New Activities to Sales Documents

To add new activity to an existing sales quotation, or sales order follow the steps below:

1. Display the sales quotation or sales order to which you need to add the new activity.
2. Choose the *Header* tab, and then tap *Activities*.
3. The list of activities related to the selected document appears. Tap .
4. The *Add Activity* page appears, containing the details of the customer for which the document is created. Add the activity details. Tap *Save*.

Editing Activities Related to Sales Documents

You can edit activities related to a specific sales quotation or sales order as long as the status of the activity is *Open*.


1. Display the list of activities related to the relevant sales quotation or sales order (see *Viewing Activities Related to Sales Documents*)
2. Display the activity you need to update and tap *Edit*.
3. Make all required changes and tap *Save*.

Note

At this stage you cannot make any modification in the sales quotation or sales order to which the activity is related.




Closing Activities Related to Sales Documents

To close activities related to a specific sales quotation, or sales order perform the following steps:

1. Display the list of activities related to the relevant document (see [Viewing Activities Related to Sales Documents](#)).
2. Tap the activity you want to close. The [Activity Details](#) page appears. Tap .
3. Tap [Close Activity](#). A confirmation message appears. To close the activity, approve the message.

Creating Sales Quotations and Sales Orders

You can create sales quotations and sales orders only for items, not for services.

1. On the [Modules](#) tab, tap the module of the sales document you want to create.
The list of existing sales quotations or sales orders appears.
2. Tap .
The [Add <Sales Document Name>](#) page appears. Mandatory fields and mandatory user-defined fields are indicated by the ghost text [Required](#).
3. The field [Doc. Series](#) displays the default numbering series defined for the sales quotation or sales order. To assign to the document different numbering series, tap this field. A list of all available numbering series appears. Tap the numbering series you want to assign to this document.
4. To specify the business partner for whom the document is created, tap [Business Partner](#).
The list of business partners appears.
5. Select the relevant business partner and tap [Done](#).
 - o The main contact person and the default sales employee of the selected business partner are automatically populated in the respective fields. To assign a different contact person or sales employee to the document, tap the relevant field. A list of the available contact persons or sales employees appears. Tap the required contact person or sales employee and then tap [Done](#).
 - o The BP currency is automatically populated in the [Currency](#) field. In case there is more than one currency defined for the BP, the first one is populated by default. To assign to the document a different currency, tap the [Currency](#) field. The list of available currencies appears. Tap the required currency and then tap [Done](#).
6. To add items to the document, tap [Item](#).
The [Items](#) page appears.
7. Tap , select the required item, and specify the required quantity. To check the available quantity of the item in the warehouse, tap . The [Inventory by Warehouse](#) page appears, displaying the total available, in-stock, ordered, and committed quantities in all warehouses, as well as in each warehouse separately. To return to the Items page, tap [Back](#). To add more items to the document, repeat steps 5 and 6.

Note

When using SAP Business One, version for SAP HANA, and on iPad devices only, the [Available to Promise](#) chart is displayed for the chosen item. For further information see the [Advanced Available to Promise \(ATP\)](#) section in the *SAP Business One, Version for SAP HANA User Guide*.

8. Specify any other relevant information.
9. To add the document, tap [Save](#).

Submitting Drafts of Sales Quotations and Sales Orders for Approval

You can create drafts of sales quotations and sales orders and trigger an approval procedure, if defined.

Note

This functionality is available only if the checkbox [Activate Approval Procedures in DI](#) is selected in [Administration](#)→[System Initialization](#)→[General Settings](#)→[BP](#) tab.

1. Create the sales quotation or sale order by following steps 1-8 provided in the [Creating Sales Quotations and Sales Orders](#) section above.
2. To add the document, tap [Save](#). A system message appears, notifying you that an approval is required.
3. Enter any relevant remarks and tap [OK](#). To return to the document, tap [Cancel](#).
4. A draft of the sales quotation or sales order is created and sent for approval.

Managing Sales Opportunities

The [Sales Opportunities](#) module enables you to create, view, and search for sales opportunities. In additions, you can view, edit, and create stages for sales opportunities.

Viewing Sales Opportunities

1. On the [Modules](#) tab, tap the [Sales Opportunities](#).

A page listing the existing sales opportunities, filtered by status appears. The sales opportunities are sorted in descending order by document number. By default, the 20 most recent sales opportunities of the selected status are displayed. To view the next 20 sales opportunities, tap [Load More...](#) at the bottom of the list. To refresh the list, pull down the list at the top of the list.

Note

By default, sale opportunities with status [Open](#) are displayed. To display sales opportunities of status [Won](#) or [Lost](#), tap the required filter. To display all the sales opportunities, tap [All](#).

When initiating search, the search applies to the filtered list only, and not to all of the existing sales opportunities.

Sales opportunities with a status of *Open* have an orange side bar in the front of the sales document.

2. Tap a sales opportunity to view its details.

The *Opportunity Info* page displays opportunity details such as business partner, status, stage, and so on.

Creating Sales Opportunities

1. On the Modules tab, tap *Sales Opportunities*.

The list of existing sales opportunities appears.

2. Tap .

The *Add Opportunities* page appears.

3. Specify the required information and tap *Save*. The fields *Opportunity Name*, *Business Partner*, and *Potential Amount* are mandatory and indicated by the ghost text *Required*.

Searching for Sales Opportunities

To search for specific sales opportunity, follow the steps described in *Searching in the Mobile App*


Viewing Stages Related to Sales Opportunities

To view stages related to a selected sales opportunity perform the following steps:

1. Display the required sales opportunity.
2. Tap *All Stages*. The list of all stages and the respected closing rate related to this sales opportunity appears.
3. Tap a stage to view its details. The *Stage Info* page appears, displaying all the details of the selected stage:
 - o *Closing Rate*
 - o *Potential Amount*
 - o *Stage* - displays the stage name
 - o *Stage Start Date* and *Stage Close Date*
 - o *Remarks*
 - o *Document* - if the stage is related to a specific sales document (sales quotation or sales order), this field displays the document type and its number. To view the related document, tap the field.
 - o *Activities* - tap to view the list of activities related to this stage. You can also add or update the activities in latest stage

Editing the Last Stage of Sales Opportunities


To edit the last stage assigned to an existing sales opportunity with status *Open*, perform the steps below.

1. Display the required sales opportunity and tap .
2. Tap *Edit Last Stage*. The details of the last stage assigned to the selected sales opportunity appears.
3. Make the required changes and tap *Save*.

Adding New Stages to Sales Opportunities


You can create new stages to existing sales opportunities with status *Open*.

To create new stages for sales opportunities perform the following steps:

1. Display the sales opportunity for which you want to create the new stage, and tap .
2. Tap *Add a Stage*. In the *Add a Stage* page enter all relevant details for the new stage. *Potential Amount* is a mandatory field.
3. To relate the new stage to a specific document type, tap *Doc. Type*, and select either sales quotation or sales order. Then, choose the specific sales quotation or sales order. The selected document and its number are displayed in the *Document* field, in the *Stage Info* page.
4. Tap *Save*.

Setting Won or Lost Statuses to Sales Opportunities

To set the status *Won* or *Lost* to an existing sales opportunity with status *Open*, perform the steps below:

1. Display the sales opportunity for which you want to change the status. Tap .
2. Tap *Set Status*. Tap the status you want to set to the sales opportunity.

Note

When changing the status of a sales opportunity from *Open* to either *Won* or *Lost*, it is not possible to make any additional changes to the document.

Viewing Dashboards in the Dashboards Module

Using the *Dashboards* module, you can view the following predefined dashboards:

- *Sales Analysis Dashboard* – contains the following charts:
 - *Fiscal Year Analysis* – compares this year's sales amount to last year by month.
 - *Opportunity Win Rate* – compares this year's opportunity win rate to last year by month.

For a displayed month, the win rate equals the number of opportunities won in the month divided by the total number of opportunities closed in the month.

Closed opportunities include opportunities with a status of *Won* or *Lost*.

Note

Fiscal Year Analysis and Opportunity Win Rate display general sales performance.

- *Top 5 Customers* – displays the top five customers selected by current fiscal year revenue.
To view details about a customer, tap *Sales Amt* or *Gross Profit* associated with the customer. The *Item Ranking and Opportunities Status* charts are updated for the selected customer.
- *Item Ranking* – displays the top five items for the selected customer in the current fiscal year.
- *Opportunities Status* – displays opportunities by status for the selected customer.

Note

Top 5 Customers, *Item Ranking*, and *Opportunities Status* display details about the top five customers.

- *Cash Flow Dashboard* – Contains the following charts:
 - *Cash Flow Forecast Overview* – displays incoming cash flow and outgoing cash flow by month.
To view details of incoming cash flow or outgoing cash flow for a month, tap the corresponding period. The *Cash Flow Details* and *BP Amount* charts are updated accordingly.
 - *Cash Flow Details* – displays the five transactions with the largest amounts for the selected period sorted in descending order by amount.
 - *BP Amount* – displays cash flow amounts by business partner for the selected period.

Note

- This dashboard is only available when working with SAP Business One 8.81 PL(07) and higher. When working with SAP Business One, version for SAP HANA, this dashboard is replaced by the *Cash Flow Forecast* dashboard, which is available on iPad devices only.
- *Purchase Quotations Dashboard* – Contains the following charts:
 - *Purchase Quotation Overview* – displays the overview of purchase quotations in three categories (*Responded*, *Partial/No Response*, *Overdue*).
To view the purchase quotation details, tap each section of the pie chart.
 - *Purchase Quotation Detail* – displays detailed information on purchase quotations according to the selected category.
The default category is *Partial/No Response*.
- *Cash Flow Forecast Dashboard* - available only when using SAP Business One mobile app 1.8.x for iOS and higher on top of SAP Business One, version for SAP HANA, and on iPad devices only. This dashboard provides you detailed information about your company's incoming and outgoing cash flows. For more information see the *Using Cash Flow* section in the *SAP Business One, Version for SAP HANA User Guide*.
- *User Defined Pervasive Dashboards* - available only when using SAP Business One mobile app 1.9.x for iOS on top of SAP Business One 9.0, version for SAP HANA, on both iPad and iPhone devices. If you created pervasive dashboards by using the pervasive analysis designer, you can view them in the *Dashboards* module. These dashboards are listed after the predefined dashboards.


In addition, you can:

- Send dashboards by e-mail
- Configure the refresh settings of the data cache for mobile dashboards

Viewing a Selected Dashboard

1. On the *Modules* tab, tap *Dashboards*.
The *Dashboards* page appears.
2. Tap the dashboard that you want to view.
The respective dashboard page appears, containing the relevant charts.
3. To maximize a chart, double-tap the chart. To return to the dashboard home page, double-tap the maximized chart.
4. To return to the SAP Business One mobile app home page, tap *Close*.

Note

When viewing the *Cash Flow Forecast* dashboard (available only when using SAP Business One version for SAP HANA, and only on iPad devices), you can tap  to minimize the dashboard to a yellow ribbon that appears on the top of the screen. Tap the yellow ribbon to display the dashboard again. To close the dashboard, tap *Done*.

Sending Dashboards by E-Mail

1. On the *Modules* tab, tap *Dashboards*.
The *Dashboards* page appears.
2. Tap one of the three dashboards.
A dashboard page appears.
3. To open a new dashboard view, tap *Send* in the top-right corner.
The *Draw and Send* view appears. Note that you can draw with your finger on this view if needed.
4. To clear the drawing, double-tap the view.
5. To open the e-mail view and send an e-mail, tap *Send* in the top right-hand corner.

Configuring the Data Cache

You use the same data cache functionality in both SAP Business One, and mobile dashboards. To enable the data cache and specify a schedule for refreshing data in dashboards, proceed as follows:

1. Choose *Administration* → *Setup* → *General* → *Dashboard Manager*.
2. In the *Dashboard Manager* window, choose the *Refresh Settings* button.
3. In the *Data Refresh Settings* window, enable the data cache by selecting the *Enable Data Cache* checkbox.
4. To establish a new time schedule, or to change an existing schedule for refreshing data in dashboards, select one or more checkboxes for the desired times (listed in the *Refresh Data At* column).
5. To save your changes, choose the *Update* button.

Viewing Service Contracts and Searching for Equipment Cards in the Service Contract Module

In the *Service Contract* module, you can:

- View details of service contracts and search for service contracts
- Search for and view customer equipment cards by entering an item's serial number for a keyword search or by using an item's barcode to scan a serial number

Note

Scanning supports only barcode 39.

Viewing Service Contracts

1. On the *Modules* tab, tap *Service Contracts*.

The *Service Contract* page appears. It displays a list of service contracts, sorted in descending order by the end date of the contract. By default, 20 service contracts with an end date furthest in the future are displayed. To view the next 20, tap *Load More...* at the bottom of the list. To refresh the list, pull down at the top of the list.

Note

An end date in red indicates an expired contract.


2. To view the details of a contract, tap the contract.
3. In the *Contract Detail* page, you can do the following:
 - o View information about the contract, such as service type and validity period. In addition, you can see cumulative response time and resolution time for service calls created for this contract and a list of the service calls for items covered by the contract.
 - o Access the business partner by tapping either *BP Name* or *BP Code*.
4. To return to the list of service contracts, on the left of the toolbar, tap *Service Contract*.

Searching for and Viewing Customer Equipment Cards

A service contract may include one or more customer equipment cards. You can search for the equipment card of an item by using the item's serial number or manufacturer's serial number (if the item's serial number is not available). The mobile app supports barcode scanning of an item's serial number by using the camera in the iPhone or iPad.

1. On the *Modules* tab, tap *Service Contract*.

The *Service Contract* page appears.

2. From either the *Service Contract* page or the *Contract Detail* page, tap the jump  button at the top-right of the screen.
 - o To search by serial number, tap *Search Serial Number*, enter a serial number, and tap *OK*.

- To use a scanned-in barcode, tap [Scan Serial Number](#). Using the camera function of your iPhone or iPad, take a picture of the item's barcode. If a valid code is found, you hear a beep; otherwise you get a "[Code not found](#)" alert.
- 3. If a customer equipment card is found, the [Customer Equipment Card](#) page appears, displaying information about the equipment, such as status and start and end dates.
To view the service contract for this equipment item, tap [Service Contract](#) at the bottom of the [Contract Detail](#) page. To view service calls created for this customer equipment card, tap [Service Call](#).

Viewing and Processing Service Calls in the Service Calls Module

In the [Service Call](#) module, you can:

- View service calls and service call details, including activities and solutions created for the service call
- Pick up service calls
- Close service calls
- Create new activities and solutions for service calls

Viewing Service Call Details

1. In the [Modules](#) tab, tap [Service Call](#).

The [Service Call](#) page appears. It displays a list of service calls, sorted in descending order by date. By default, the most recent 20 service calls with status [Open](#) are displayed. To view all of the existing service calls, tap [All](#). To view only service calls with status [Pending](#), tap [Pending](#). To view only service calls assigned to you, tap [My](#). For service calls with status [Open](#) or [Pending](#) the creation date is considered; for closed service calls, the [Closed On](#) date is considered. To view the next 20, tap [Load More...](#) at the bottom of the list. To refresh the list, pull down at the top of the list.


2. To view the details of a service call, tap the call.

In the [Service Call Info](#) page, you can view the following:


- Business partner details
 - Details about the item for which the call was created
 - Call status and priority,
 - Activities created and assigned to the service call
 1. To view the activities created for the service call, tap [Activities](#).
 2. On the [Activities List](#) page, tap an activity to view its details.
 - Solutions created and assigned to the service call
 1. To view solutions created and assigned to the service call, tap [Solutions](#).
 2. On the [Solution](#) page, tap a solution to review its details.
3. To return to the list of service calls, tap [Back](#).

Picking Up Service Calls

You can pick up service calls with status *Open*. The status of the service call is then updated to *Pending* and the *Handled By* field is filled with the name of the current user. In addition, you can pick up service calls with status *Pending* that are handled by users other than the current user. In that case, the *Handled By* field is updated accordingly.



1. In the *Modules* tab, tap *Service Call*.
2. The *Service Call* page appears with a list of service calls. For information about the list, see step 1 in *Viewing Service Call Details*. Service calls with status *Open* have an orange side bar in the front of the service call.
3. Tap the service call you want to pick up.
4. On the *Service Call* Info page, tap the jump  button and then tap *Pick Up*.
A warning message appears asking you to confirm picking up the call.
5. To continue, tap *OK*.
You can now process the service call: add new activities or solutions and close the service call.

Closing Service Calls

1. In the *Modules* tab, tap *Service Call*.
The *Service Call* page appears with a list of service calls. For information about the list, see step 1 in *Viewing Service Call Details*. Service calls with status *Open* have an orange side bar in the front of the service call.
2. Tap the service call you want to close.
3. On the *Service Call* Info page, tap the jump  button and then tap *Close Service Call*.
A warning message appears asking you to confirm closing the call.
4. To close the call, tap *OK*.
The status of the call is updated to *Closed* and the *Closed On* field is filled with the date on which you closed the call.

Adding New Activities and Solutions to Service Calls

You can add new activities and new solutions only to service calls with status *Open* or *Pending*.

1. Display the relevant service call.
 - o To add an activity:
 1. Tap *Activities*.
 2. On the *Activities List* page, tap .
 3. On the *Add Activity* page, specify the activity details and tap *Save*.
 - o To add a solution:
 1. Tap *Solutions*.
 2. On the *Solutions List* page, tap .
 3. On the *Add Solution* page, fill in the solution details and then tap *Save*.

-
2. To return to *Service Call* page, tap *Back*.

Integrating Customized Help

You can integrate a customized help file into the app, which is shown as a new user-defined module. To do this, upload a help file in PDF format using the SAP Business One integration (B1i) framework (B1iF).

1. To open the integration framework Web page, choose the *Control Center* menu.
2. In the pop-up *Control Center* Web page, choose *Maintenance*.
3. Choose the BizStore Upload menu on the left.
4. To specify your own help file in PDF format, choose Browse.
5. Make sure the BizStore-URI is in the path ``/com.sap.b1.mobile/hlp/<help>.pdf'`.

Appendix

More Information

Further information can be found in the following two SAP Notes:

- [1618978 - B1ic_Troubleshooting Guide for B1ic Installation](#)
- [1602674 - SAP Business One mobile app for iOS - Troubleshooting Guide](#)

Function-Level Authorizations for Users to Work with the App

The Modules tab of the mobile app displays the twelve modules provided by SAP, as well as user defined modules if exist. For SAP-provided modules, the mobile app retrieves authorization settings as defined in SAP Business One desktop application, controlling accessing, viewing, adding, and editing data.

The *Alert* and *Approval* modules do not require function-level authorization and are accessible by all users that are enabled to work on a mobile device.

In SAP Business One, a super user can assign permissions to a user by choosing *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*.

The following table shows the functions that users can perform, and what authorizations are needed.

Action	Minimum Required Authorization	Permission Setup in SAP Business One
View SAP Crystal Reports	Full Authorization	A user needs authorization in SAP Business One to view each report. If a user does not have authorization to view a report in SAP Business One, the user cannot view the report using the mobile app.
Add customer or vendor	Full Authorization	<i>Adding Customer/Vendor Master Data</i> section in <i>Authorizations</i> window
Add lead	Full Authorization	<i>Adding Lead BP</i> section in <i>Authorizations</i> window
View Leads	Full Authorization	<i>Business Partner Type</i> → <i>Leads in the Business Partners</i> section in <i>the Authorizations</i> window
View Customers	Full Authorization	<i>Business Partner Type</i> → <i>Customers</i> in the <i>Business Partners</i> section in the <i>Authorizations</i> window
View vendors	Full Authorization	<i>Business Partner Type</i> → <i>Vendors</i> in the <i>Business Partners</i> section in the <i>Authorizations</i> window
View account balance and credit limit in the <i>BP Info</i>	Read Only	<i>BP Balances</i> in the <i>General</i> section in the <i>Authorizations</i> window

Action	Minimum Required Authorization	Permission Setup in SAP Business One
page		
Add activity	Full Authorization	<i>Activity</i> section in <i>Authorizations</i> window
Edit activity	Full Authorization	<i>Activity</i> section in <i>Authorizations</i> window
View activity	Read Only	<i>Activity</i> section in <i>Authorizations</i> window
View item	Read Only	<i>Item Master Data</i> section in <i>Authorizations</i> window
View price list	Read Only	<i>Price Lists Group #</i> section in <i>Authorizations</i> window
View special price list ¹	Read Only	<i>Special Prices for Business Partners</i> section in <i>Authorizations</i> window
View sales opportunity	Read Only	<i>Sales Opportunities</i> section in <i>Authorizations</i> window
Add/Update sales opportunity	Full Authorization	<i>Sales Opportunities</i> section in <i>Authorizations</i> window
View sales order	Read Only	<i>Sales Order</i> section in <i>Authorizations</i> window
Add/Update sales order	Full Authorization	<i>Sales Order</i> section in <i>Authorizations</i> window
View sales quotation	Read Only	<i>Sales Quotation</i> section in <i>Authorizations</i> window
Add/Update sales quotation	Full Authorization	<i>Sales Quotation</i> section in <i>Authorizations</i> window
Update sales employee in sales quotation or sales order	Full Authorization	<i>Change Sales Employee</i> and <i>Sales Employee Update</i> in <i>Sales - A/R</i> section in <i>Authorizations</i> window
View dashboard	Full Authorization	<i>Dashboard</i> section in <i>Authorizations</i> window
View service contract	Read Only	<i>Service Contract</i> section in <i>Authorizations</i> window
View customer equipment card	Read Only	<i>Customer Equipment Card</i> section in <i>Authorizations</i> window
View service calls	Read Only	<i>Service</i> Section in <i>Authorizations</i> window
Process service calls	Full Authorization	<i>Change Status in Special Service Call Authorizations</i> section in <i>Authorizations</i> window
View key performance	Read Only	<i>Query Generator</i> section in <i>Authorizations</i> window

¹ The price lists that belong to the price list group for which the user has either full authorization or read-only authorization are displayed in the mobile app.

Action	Minimum Required Authorization	Permission Setup in SAP Business One
indicator (KPI) ²		

The permission related to a price list has nothing to do with the permission related to price list groups. If a user has no authorization for a price list, SAP Business One does not display any price list. If a user has no authorization to a specific price list group, SAP Business One does not display any price lists that belong to this group.

Mobile App Function Availability Based on SAP Business One License Type

The functions available for each user on the mobile app are derived from the type of license assigned to the user and from the authorizations granted to the users in SAP Business One desktop application.

Users who are granted with full authorizations within the license type assigned to them can use all the mobile app functions described in this document with the following exceptions:

- Limited Logistics License – cannot access Sales Opportunity, Service Call, and Service Contract Modules, and cannot add new Sales Quotations.
- Limited Financials License – cannot access Sales Opportunity, Service Call, and Service Contract Modules, and cannot add new Sales Orders and Sales Quotations.
- B1 Starter Package License – cannot access Service Call and Service Contract Modules.
- CRM Services License – cannot add new Sales Orders.

² In the KPI view, queries that belong to the saved queries group for which the user has either full authorization or read-only authorization are displayed.

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