

How to Guide
SAP Business One
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PUBLIC

How to Work with SAP Business One Sales, mobile app for iOS

All Countries



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.
Example	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 .

Document History

Version	Date	Change
1.0	2016-03-25	Initial version
1.1	2016-06-10	Added Churn probability, special price
1.2	2016-09-09	Map with location displayed for meeting type activities Recommended items in creating/editing Sales Quotation and Sales Order

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1 Introduction

With the SAP Business One Sales app you can work with activities, view business content, manage customer data, monitor sales opportunities, and much more.

Key features:

- Activities - View, add, edit, close, and create follow-up activities of the user who is currently logged on to the mobile app.
- Customers – Access and manage customer information including addresses, phone numbers, and contact details; view historical activities and special prices; create new customers and new activities; and contact or locate partners.
- Items – Monitor inventory levels and access detailed information about your products, including sales price, available quantity, product specifications, and pictures.
- Sales documents – Create, view, update, and search for sales quotations and sales orders. 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 of sales opportunities.
- KPI and Dashboards – View predefined KPIs and dashboards (sales analysis and recommendations) in normal and full-screen mode.
- Attachments - View, download, and upload attachments (photos) to customers, items, activities, sales opportunities, and sales documents.

Note

The SAP Business One Sales app is relevant for SAP Business One, version for SAP HANA only.

SAP Business One Sales app does not support SAP Business One Cloud. Mobile Service cannot be installed from the SAP Business One Cloud environment.

The SAP Business One Sales app uses SAP Business One analytics powered by SAP HANA (B1A) in the backend. Before you can use the analytical features in the SAP Business One client application, you must first initialize the company databases on the SAP HANA database server and enable the analytics in the client application. For more information, see the *SAP Business One analytics powered by SAP HANA Administrator's Guide* and *User Guide*.

2 Using the SAP Business One Sales App

2.1 Getting Started

1. Tap the SAP Business One Sales app.



2. Enter your user name and password.

The home page of the SAP Business One Sales app appears.

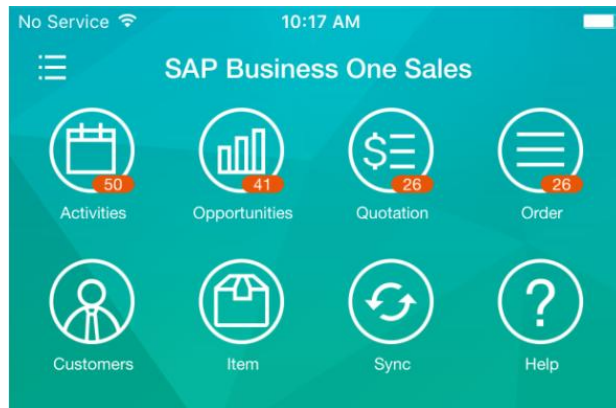
Note

By default, users have full authorization for all features included in the SAP Business One Sales app. To enable user authorization limitation, perform the follow steps in the SAP Business One client:

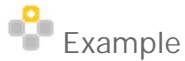
1. From the SAP Business One *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*.
2. Select a mobile user and choose *General* → *Disable DIAPI Permission Check*.
3. Change the authorization method to *No Authorization*.

2.1.1 Home Page

- At the top of the home page screen, you can see the main functions of the SAP Business One Sales app:
 - *Activities*
 - *Opportunities*
 - *Quotation*
 - *Order*
 - *Customers*
 - *Item*
 - *Sync*
 - *Help*



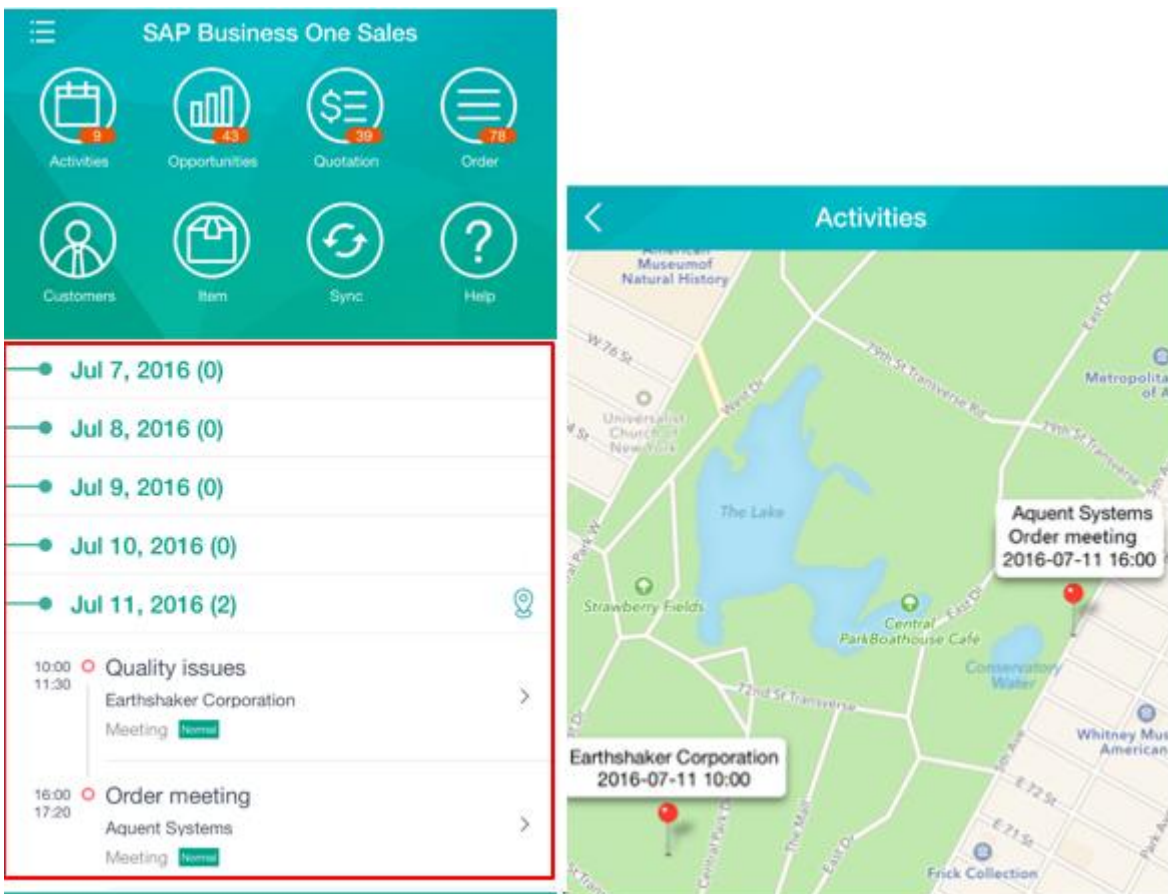
- In the middle of the home page screen, you can view the recent active activities for today's date and the active activities for the following 4 days. You can see each activity's priority based on the color you configure for it.



Example

Red indicates high priority, Green is for normal and Gray means low priority.

If you have a meeting type activity and the address of this meeting is not empty, to the right of the date you can see the map icon. Clicking this icon shows a map where you see all meeting type activities on this date and their address information (displayed with BP name, remarks, start date and time).



Tap the *Sync* icon in order to synchronize the activities in the SAP Business One Sales app to the phone calendar. The Sync calendar function allows you to synchronize your activity from today to one 15 days prior or later.

- At the bottom of the home page screen, the following options are available:



- Tapping the *Home* icon displays the home page of the SAP Business One Sales app.
- Tapping the *Customers* icon opens a list of customers.
- Tapping the *KPI* icon opens a performance dashboard.

2.1.2 KPI Screen

In the *KPI* (Key Performance Indicator) screen, you can visualize your data in various widgets.


The predefined advanced dashboards appear by default in the *KPI* screen, which contains the follow KPI and pervasive dashboard widgets:

- Potential amounts of open opportunities (KPI)
- Sales Order amount for the current month (KPI)
- Your top 5 customers (pervasive dashboard)
- Your top 5 best-selling items (pervasive dashboard)



When you tap any of the widgets in the *KPI* screen, you can drill down to view more information.

If you want to customize the dashboards, perform the following steps:

1. In the SAP Business One, version for SAP HANA client, from the toolbar, choose  (*Pervasive Analytics*).
Alternatively, in the SAP Business One, version for SAP HANA client, from the menu bar, choose *Tools* → *Pervasive Analytics*.


 Note

Only users with authorizations for the pervasive analytics designer can access the window.


2. Find the predefined advanced dashboard *Adv. Dashboard for SAP Business One Sales App - Curr. Sales EE* and edit it to meet your business needs.

You can add new widgets, arrange the order of the widgets, or modify the widgets. But you cannot delete this predefined advanced dashboard.

For more information, see *How to Work with Pervasive Analytics*.

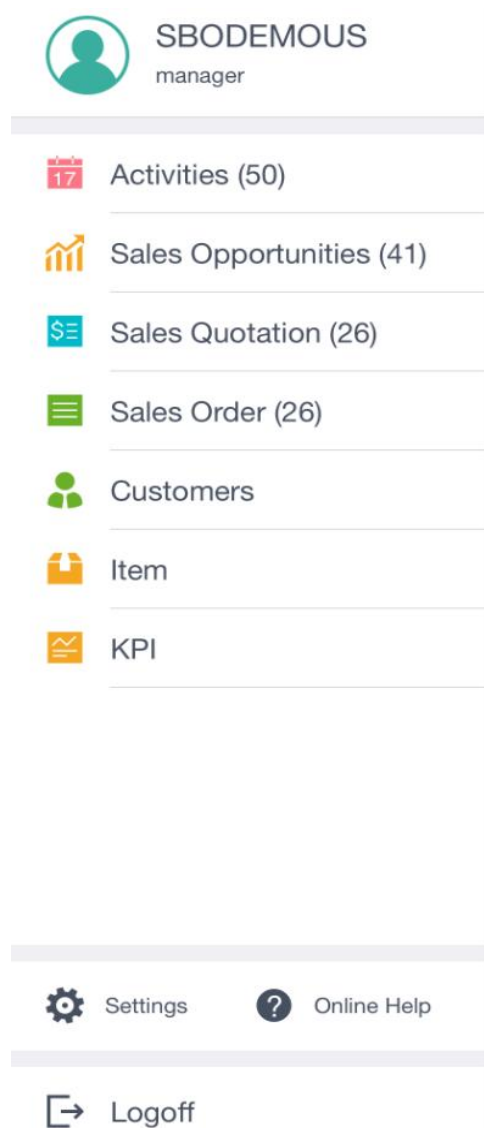
3. Save the advanced dashboard.
4. In the SAP Business One Sales app, from the *KPI* Screen, tap  (*Refresh*).
The customized dashboards appear.

2.1.3 List View of Functions

Tap the  icon on the top left hand corner of the home page; the list view of all functions is displayed.

 Note

Each category has a number next to it representing the number of open transactions within the category.



2.1.4 Configuration Settings

Tap [Settings](#) to access configuration settings. In the [Settings](#) window, you can:


- View the current user of the app.
- Choose the [Clear Cache](#) button to clear the cached data that has been accessed by the current user.

Note

If the network is disconnected, you can still view the cached data. For example, you can view the sales document that was opened when the app was online.

- Switch on/off the [Enable Touch ID](#) function. After you switch on [Enable Touch ID](#), you can use your fingerprint instead of a password when you log on.

- Choose the [Layout Settings](#) button to reorganize the layout of the displayed fields in the [Activities](#), [Sales Opportunities](#), [Sales Quotation](#), [Sales Order](#) and [Item](#) modules.

To change a field's position, tap the  icon to select the field, and drag it to the proper position.

2.2 Managing Activities

In the [Activities](#) module you can:

- View the activities assigned to you in a calendar format view
- Edit existing activities and create new activities
- Create follow up activities
- Close activities

2.2.1 Viewing and Editing Activities

1. Tap the [Activities](#) module.

The [Activities](#) page opens, displaying activities on a calendar page.

Activities of different types are marked by different colors. The activity name, its start time and end time are displayed.

2. To view the activity details, tap the relevant activity. The [Activity](#) page appears.
3. To link the activity to a related sales document, tap the [Link To](#) button.
4. To report the location of the activity, tap the [Check In](#) button.

After a successful check-in, the address appears. You can view the address in the map. You can also record multiple location addresses related to this activity.


Note

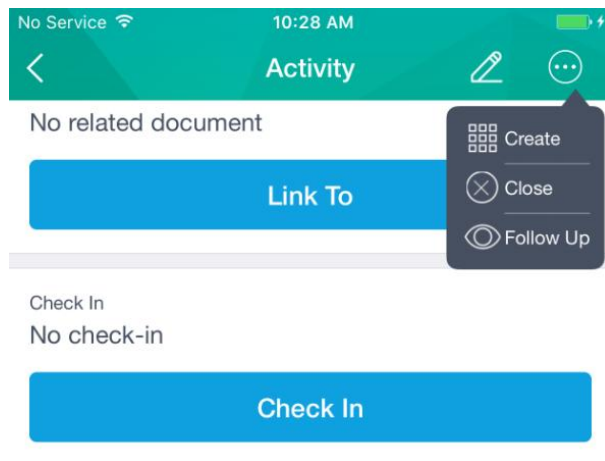
The check-in activities can be reviewed in the SAP Business One client ([Business Partners](#) -> [Business Partner Reports](#) -> [Activity Check-In Report](#)). A sales manager user who has the authorization can review the report. The report displays previous 7 days or 14 days check-in summary.

5. To add photo attachments, tap [Attachment](#).
6. To edit the activity details, tap [Edit](#). Make all the changes you need and tap [Save](#).

2.2.2 Creating a Follow-up Activity


You can create a follow-up activity for an existing activity. Follow the steps below:

1. Display the activity for which you want to create a follow-up activity.
2. Tap  and choose [Follow Up](#). The [Activity](#) page appears in add mode, displaying all the details of the original activity. Make any required changes and tap the [Create](#) button to create a follow-up activity.



2.2.3 Creating a Sales Document Based on an Activity


You can create a sales document based on an existing activity. Follow the steps below:

1. Display the activity for which you want to create a sales document.
2. Tap  and choose *Create*. You can create a new sales opportunity, sales quotation or sales order. The sales document page appears in add mode.

For more information, see *Creating Sales Quotations and Sales Orders* and *Creating Sales Opportunities*.

2.2.4 Closing Activities

You can close an active activity. Follow the steps below:

1. Display the activity which you want to close.
2. Tap  and choose *Close*.

After you close the activity, you cannot edit it, and it appears in gray. You can create a follow-up activity for it.

2.3 Managing Customer Data

In the *Customers* module, you can filter, view, update, add, and search for customer information.

2.3.1 Filtering and Sorting Customers

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

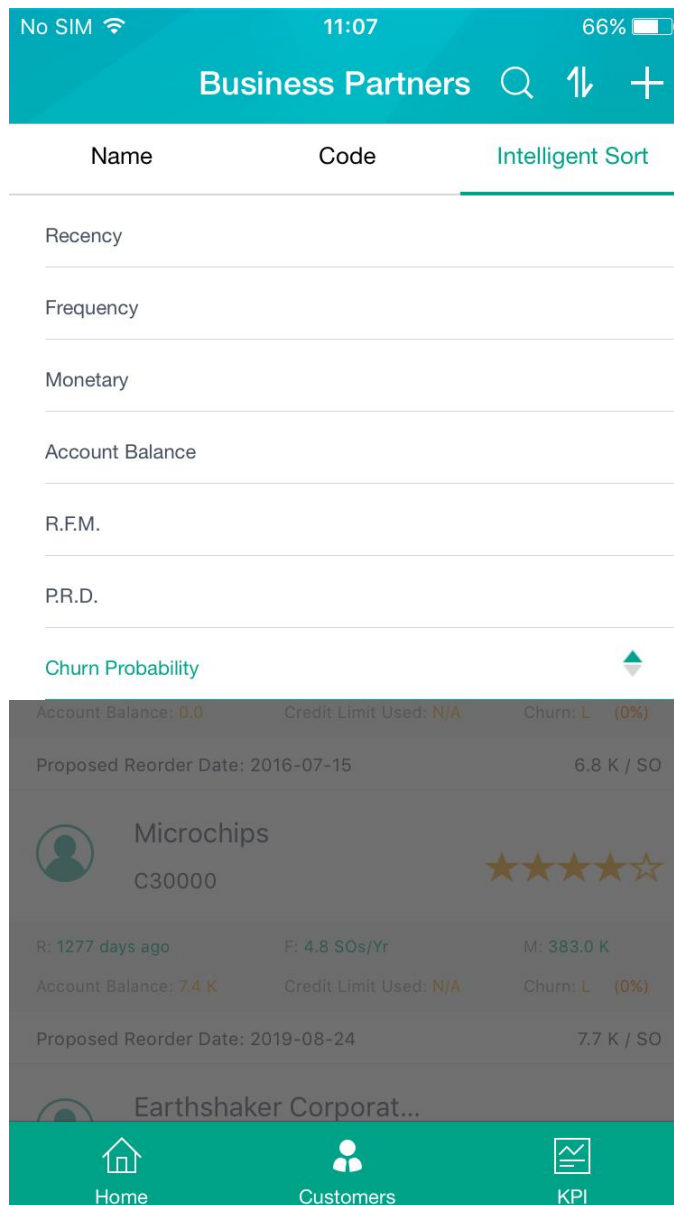
Tap a filter to view a list of business partners of the respective type:

- *Customer* - applied by default. Displays a list of business partners of the Customer type.
- *Lead* - Displays list of business partners of the Lead type.

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

To sort the business partner list, tap the  icon, and sort by *Name*, *Code* or *Intelligent Sort*.

Tapping the *Intelligent Sort* option opens a detailed screen with sorting criteria such as Recency, Frequency, Monetary value, Account Balance, Churn Probability and more. R.F.M. is the abbreviation of Recency, Frequency, and Monetary. P.R.D is the abbreviation of Proposed Reorder Date.



2.3.2 Viewing Customer Information

1. Tap the *Customers* module.

A list of customers appears, with each customer rated with 1-5 stars, 5 being the highest rating and 1 the lowest. The rate is calculated according to the recency, frequency of posting orders, and monetary values, consequently displaying your top customers.

- o *R: XXX days ago* (R stands for Recency)

Recency = Number of days since last sales order posting date. Customers will be displayed by days in ascending order.

- o *F: XXX SOs/Yr* (F stands for Frequency; SOs/Yr stands for Sales Orders/Year)

Frequency= Number of sales orders*365/Number of days in selected period (total life cycle days, first SO date to current day), rounded up to 0.1. Customers will be displayed by number in descending order.

- o *M: XXX* (M stands for Monetary)

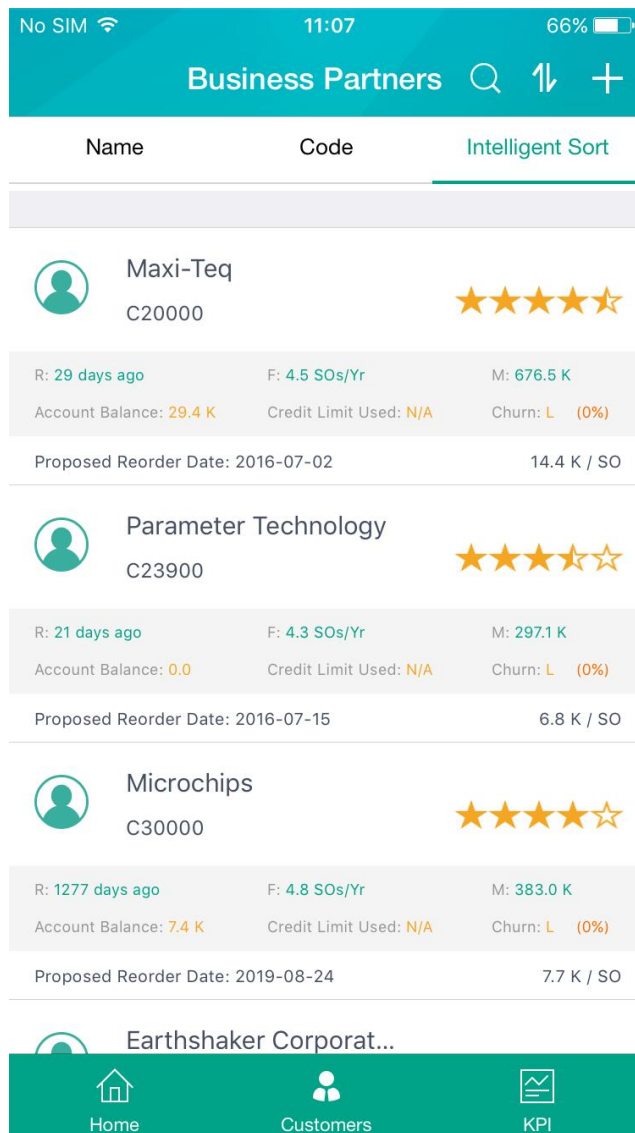
Monetary means total sales order amount of a customer that has accumulated since the first sales order. The unit of measure will be adjusted automatically. Customers will be displayed by monetary value in descending order.

- o The *Churn* field displays the customer attrition risk as low (L), medium (M) or high (H), as well as the churn probability rate in percentage.

Note

To first use the churn probability feature and to update the churn statistics with the latest data in your company database in the future, in a web browser, navigate to the following URL: <https://<ServerAddress>:<Port>/PredictiveAnalysis>, log on to the company you are working with, and choose the *Refresh Now* button. On the web page, you can also find the history of previous refreshes. The URL supports the following Web browsers: Google Chrome, Microsoft Edge, Apple Safari, and Mozilla Firefox.

- o The *Proposed Reorder Date* field creates a proposal date for you to contact the customer for a new order.
- o The value beside the */SO* field represents the average amount per Sales Order. This allows you to keep track of how valuable each customer is.



i Note

The behavior under the *Lead* tab is identical to that under the *Customer* tab. You are able to see the industry, last activity days, open opportunities number, and potential number of opportunities.


2. To view information about a customer, tap that specific customer on the screen.

The *Business Partner* page appears. It includes the following tabs:



- o *General* – Displays the account balance and credit limit of the customer, as well as contact details for the company, such as phone number, e-mail address, and Web site.
User-defined fields are displayed under this tab in a separate section, grouped by the user-defined field categories.
- 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 customer.
 - o *Activities* – Displays the list of activities created for the business partner.

To view an activity, tap it.

The *Activity* page appears. To edit the activity, tap the *Edit* icon, make changes, and tap *Save*.

To add an activity, on the right of the toolbar, tap .

The *Activity* page appears in add mode. Specify the information and tap *Create*.

- *Sales 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 top left of the screen, tap .
- *Special Prices* – Displays the special prices of items for the business partner.
To view items that have special price defined, tap *Special Prices*. The discount percentage and the special price are displayed. To view the item information, tap the item. From the item display, tap *Unit Price* to view the item's price in various price lists.

Note


Date-dependent special prices and quantity-based special prices are not supported.

- *Dashboard* - Displays the pervasive analysis dashboards' information for this customer.

The predefined advanced dashboards contain the follow KPI and pervasive dashboard widgets:

- Sales order amount by months (LC) (pervasive dashboard)
- Total amount of open deliveries (LC) (KPI)
- Customer balance (LC) (KPI)
- Top 5 bestselling items by sales amount (pervasive dashboard)

If you want to customize the dashboards, perform the following steps:

1. In the SAP Business One, version for SAP HANA client, from the toolbar, choose  (*Pervasive Analytics*).

Alternatively, in the SAP Business One, version for SAP HANA client, from the menu bar, choose *Tools* → *Pervasive Analytics*.


Only users with authorizations for the pervasive analytics designer can access the window.

2. Find the predefined advanced dashboard *Adv. Dashboard for SAP Business One Sales App - Customer* and edit it to meet your business needs.

You can add new widgets, arrange the order of the widgets, or modify the widgets. But you cannot delete this predefined advanced dashboard.


When you modify or add a new widget, make sure that the data is based on the specific customer you are exploring. Thus, in the data source of the KPIs and dashboards, you must include the **CardCode** dimension, and the name is case sensitive. Note that in a query-based data source, the result must have a column named *CardCode*.

For more information, see *How to Work with Pervasive Analytics*.

3. Save the advanced dashboard.
4. In the SAP Business One Sales app, from the *Dashboard* tab, tap  (*Refresh*).

2.3.3 Adding Customers

1. Tap the *Customers* module.

-
- The *Business Partners* page appears.
 2. Tap .
The *Business Partner* page appears in add mode.
 3. Specify the information and tap *Create*.

2.3.4 Editing Customer Information

1. Display the business partner whose information you want to edit (see *Viewing Customer Information*).
2. Tap the *Edit* icon.
The *Business Partner* page appears in edit mode.
3. Tap any detail you want to edit, and make the required changes.



Example

To change the business partner name, tap *Name*. Enter the new name in the text box.

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

The list of contacts defined for the business partner appears:

5. To add a contact, tap *Create a New Contact*, specify the information, and tap *Create*.
 6. To edit an existing contact, tap the contact, make the changes, and tap *Save*.
- To change a bill-to or ship-to address, follow the same options as for changing the main contact.
4. After making your changes, tap *Save*.

2.4 Viewing Items in the Item Module

In the *Item* module, you can:

- View information about items in inventory, including unit price of a selected item
- View quantities of an item by warehouse
- Search for items in inventory

2.4.1 Viewing Information about Items

1. Tap the *Item* module.
The list of items is displayed, sorted alphabetically by item code. To refresh the list, pull down the list from the top of the 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* page displays detailed information about the item, including user-defined fields.

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

2.5 Managing Sales Documents (Orders and Quotations)

You can view, edit, search for, and create sales quotations and sales orders by using the relevant modules:

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

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


Note

To trigger the approval procedure when adding a document, you must activate the approval procedure from the SAP Business One client. From the SAP Business One *Main Menu*, choose *Administration* -> *System Initialization* -> *General Settings* -> *BP* tab and then select the checkboxes *Activate Approval Procedures*, and *Activate Approval Procedures in DI*.

2.5.1 Viewing Sales Document Information

1. To view a sales order or a sales quotation, tap the relevant module.

A page appears listing the existing sales documents for the module you selected.

By default, the sales documents are sorted in descending order by the posting date. To sort by document number or BP name, tap the  icon, and choose *Doc No.* or *BP Name*.

To refresh the list, pull down the list at the top of the list.

Note

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

2. To view information about a sales document in the list, tap the sales document.

The *Info* page for the sales order and sales quotation contains four tabs: *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:

- *Header* tab – Document number, dates, total values, currency, sales employee, customer ref. number, status, business partner details, activities, and so on.
- *Contents* tab

For an item type document:

Each row has a *Details* page, including item description, item code, quantity, unit of measure, items per unit, and user-defined fields, if any exist.

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.

2.5.2 Updating Sales Documents

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

- The sales quotation or sales order has an Open status.
- The sales quotation or sales order was not fully or partially drawn into the target document.

Procedure

1. Display the sales quotation or sales order you need to update.
2. Tap  in the top-right hand corner, and the document is switched to *Edit* mode.
3. Make all the changes required.
4. To save your changes, tap *Save*; otherwise, tap *Cancel*.


Note

The following values cannot be modified:

- o Customer code and customer name
- o Document currency

2.5.3 Copying Sales Quotations to Sales Orders

You can further process sales quotations and copy them to sales orders. To do so, follow the steps below:

1. Display the sales quotation you want to copy into a sales order, and tap .
2. Tap *Copy to Order*. The *Sales Order* page appears in add mode and displays all the information taken from the selected sales quotation.
3. To add the sales order based on the sales quotation, tap *Create*.

The sales order is saved and the status of the sales quotation which is the base document is set to *Closed*.

2.5.4 Filtering Sales Documents

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

To filter and view existing documents, choose the *Sales Quotation* or *Sales Order* module. A list of the respective documents appears:

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

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

 Note

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

2.5.5 Managing Activities for Sales Documents


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

2.5.5.1 Viewing Activities Related to Sales Documents

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

2.5.5.2 Adding New Activities to Sales Documents

To add a 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*. The list of activities related to the selected document appears.
3. Tap . The *Activity* page appears in add mode, containing the details of the customer for which the document is created.
4. Add the activity details and tap *Create*.

2.5.5.3 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 the *Edit* icon.
3. Make all required changes and tap *Save*.

Note

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


2.5.5.4 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* page appears.
3. Tap  and choose *Close*. A confirmation message appears.
4. To close the activity, approve the message.

2.5.6 Creating Sales Quotations and Sales Orders

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

1. Tap the module of the sales document you want to create.
The list of existing sales quotations or sales orders appears.
2. Tap .
The sales document page appears in add mode. Mandatory fields and mandatory user-defined fields are indicated by the ghost text *Required*.
3. The *Series* field displays the default numbering series defined for the sales quotation or sales order. To assign different numbering series to the document, 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.
 1. Select the relevant business partner. The main contact person and the default sales employee of the selected business partner are automatically populated in the respective fields.
 2. 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.
 3. In the *Logistics* section, the default *Ship To* and *Bill To* addresses appear.
5. To add items to the document, tap *Items*.
The *Items* page appears.
 1. Select the relevant items and tap *Done*.

Note


You can select recommended items for this customer. The recommended items are calculated by the machine learning algorithm. If this customer has no sales records or recommended items in the database, the recommended items are the most frequently bought items company wide.

Before you can use the recommendation feature, make sure that you have run the recommendation service successfully, by navigating to the URL: <https://<ServerAddress>:<Port>/PredictiveAnalysis> in a Web browser, logging on to the company you are working with, and choosing the *Refresh Now* button. The supported Web browsers are: Google Chrome, Microsoft Edge, Apple Safari, and Mozilla Firefox.

2. To change the quantity of the items, specify the quantity, and tap *Done*.
3. To add more items to the document, tap the *Choose Item* button.


Note

The recommended items are calculated based on the customer and the last item you have selected in step 1.

4. To return to the sales document page, tap .
6. Specify any other relevant information.
7. To add the document, tap *Create*.

2.5.7 Duplicating Sales Documents

To duplicate sales orders or sales quotations, follow the steps below:


1. Display the document you want to duplicate and tap . Tap *Duplicate*.

The sales document page appears in add mode with the information of the original sales document.

2. To change fields, see *Creating Sales Quotations and Sales Orders*.

2.5.8 Cancelling Sales Documents

To cancel sales orders or sales quotations with an Open status, follow the steps below:

1. Display the document you want to cancel and tap . Tap *Cancel Order* or *Cancel Quotation*, depending on the document you want to cancel.
2. A system message appears warning that cancellation of the document is irreversible. To continue and complete the cancellation, tap *Confirm*.
3. The status of the document is set to *Cancelled*.

2.6 Managing Sales Opportunities

The *Opportunities* module enables you to create, view, and search for sales opportunities. In addition, you can view, edit, and create stages for sales opportunities.

2.6.1 Viewing Sales Opportunities

1. Tap the *Opportunities* module.

A page appears listing the existing sales opportunities, filtered by status.

For each opportunity in the list, you can see the opportunity name, potential amount, the closing rate and the predicted closing date. To refresh the list, pull down the list at the top of the list.

Note

By default, sale opportunities with an Open status are displayed. To display sales opportunities with a *Won* or *Lost* status, tap the required filter.

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

Sales opportunities with an Open status have an orange side dot in the front of the document.

2. To display all the sales opportunities in a pipeline mode, tap *Pipeline*. To switch back, tap *Opportunities*.

The pipeline displays the stages of the opportunity.

3. Tap a sales opportunity to view its details.

The *Sales Opportunity* page displays opportunity details such as business partner, stage, and more.

2.6.2 Creating Sales Opportunities

1. Tap the *Opportunities* module.

The list of existing sales opportunities appears.

2. Tap .

The *Sales Opportunity* page appears in add mode.

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

2.6.3 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 *Stage* - displays the stage name
 - o *Potential Amount*
 - o *Closing Rate*
 - o *Stage Start Date and Stage Close Date*
 - o *Sales Employee*
 - o *Remarks*

- o *Doc. Type and Document* - If the stage is related to a specific sales document (sales quotation or sales order), these fields display 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 the latest stage.

2.6.4 Editing Sales Opportunities


You can edit the header information of a sales opportunity with an Open status or you can edit its last stage. To do so follow the steps below:

1. Display the required sales opportunity and tap .
2. The details of the selected sales opportunity appear.
3. Make the required changes and tap *Save*.

2.6.5 Adding New Stages to Sales Opportunities


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

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

1. Display the sales opportunity for which you want to create a new stage, and tap .
2. Tap *Add a Stage*. In the *Stage Info* 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.
4. Tap *Save*.

2.6.6 Setting Won or Lost Statuses to Sales Opportunities

To set the *Won* or *Lost* status to an existing sales opportunity with an Open status, 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.

2.7 Managing Attachments

You can view, download, and upload attachments from and to customers, items, activities, sales opportunities, and sales documents.

2.7.1 Setting Up Attachment Folder

To set up the attachment folder, perform the following steps:

- From Windows:
 1. Create a shared folder with read and write permissions.
 2. In the SAP Business One client, choose *Administration* -> *System Initialization* -> *General Settings* -> *Path*. In the *Attachments Folder* field, enter the shared folder. Make sure that the folder path is a network path rather than a local path. For example, `\\10.59.38.19\Attachments`.
- From Linux:
 3. Create a folder (for example, `/mnt/Attachments`).
 4. Mount the Linux folder to the Windows folder by running the following command:

```
mount -t cifs -o username=xxxxx,password=*****,file_mode=0777,dir_mode=0777  
"/10.59.38.19/Attachments/" /mnt/Attachments
```

The command `username` and `password` is the Windows username and password.

Note

To facilitate customers with the configuration, `/etc/fstab` can be leveraged to automatically mount to the Windows shared folder once the Linux server reboots. You can perform the following steps to achieve this:

1. Log in as a root user and create a credentials file (for example, `/etc/mycifspass`) with the following content:

```
username=xxxxx  
password=*****  
file_mode=0777  
dir_mode=0777
```
2. Open the system configuration file `/etc/fstab` and append one line, as below:

```
//10.59.38.19/Attachments/ /mnt/Attachments cifs credentials=/etc/mycifspass  
0 0
```
3. Reboot the Linux server and you will find the Windows shared folder is automatically mounted.

2.7.2 Viewing Attachments


1. Open the relevant document or object and navigate to the *Attachments* entry. Tap *Attachments*.
2. The *Attachments* page appears, listing the attached files. Tap the attachment file you want to view.

The attachments include not only those uploaded by the SAP Business One Sales app, but also those that already exist in the SAP Business One application.

2.7.3 Uploading Attachments

You can upload attachments of image file types only, by either browsing to the required image file, or by taking a picture using your mobile device.

Uploading attachments is only possible to documents and objects that can be updated.

1. Open the document or object to which you want to add an attachment.
2. Tap *Attachments*. The *Attachments* page appears.
3. Tap . To choose an existing image file, tap *Choose Photo* and browse to the image file you want to attach. To take a picture and attach it, tap *Take Photo*.
4. In the Add Attachments page, enter the name of the photo.

3 Configuring the SAP Business One Sales App

3.1 System Requirements

Requirements for Mobile Devices

SAP Business One Sales app supports:

- iPhone 5 and above
- iOS 8.0 and above

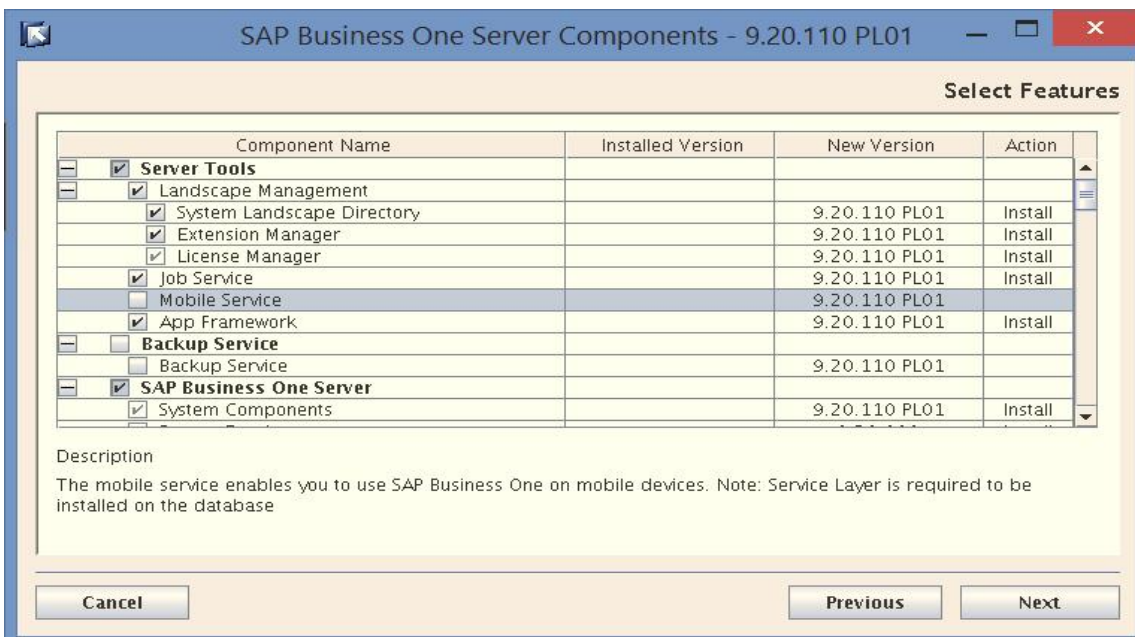
i Note

The SAP Business One Sales app supports iPhone ONLY.

Requirements for SAP Business One

- You have installed SAP Business One 9.2 patch level (PL) 03, version for SAP HANA or higher.
- In the server components installation or upgrade, you have selected the *Mobile Service* component.

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.



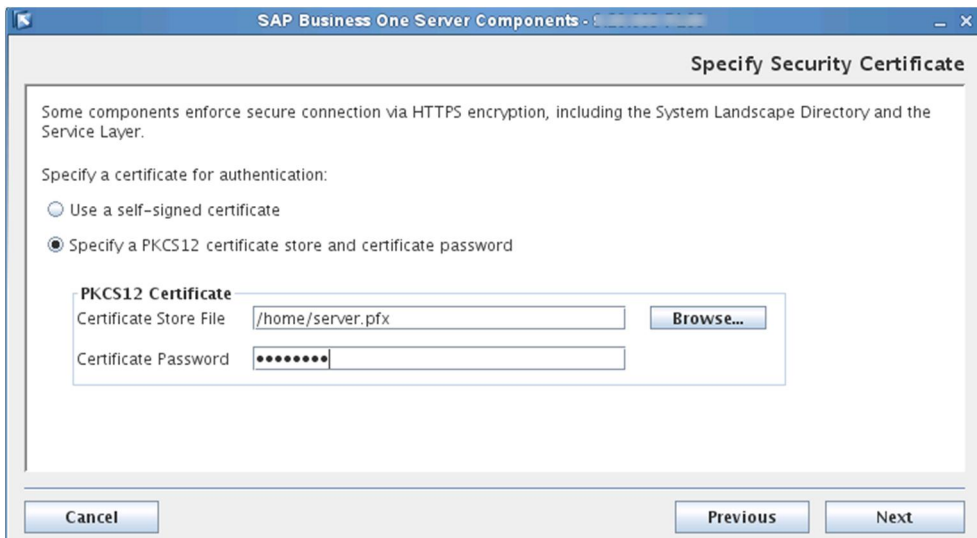
i Note

The SAP Business One Sales app is relevant for SAP Business One, version for SAP HANA only. You will need the Service Layer, Analytics Platform and App Framework in order for this app to work successfully.

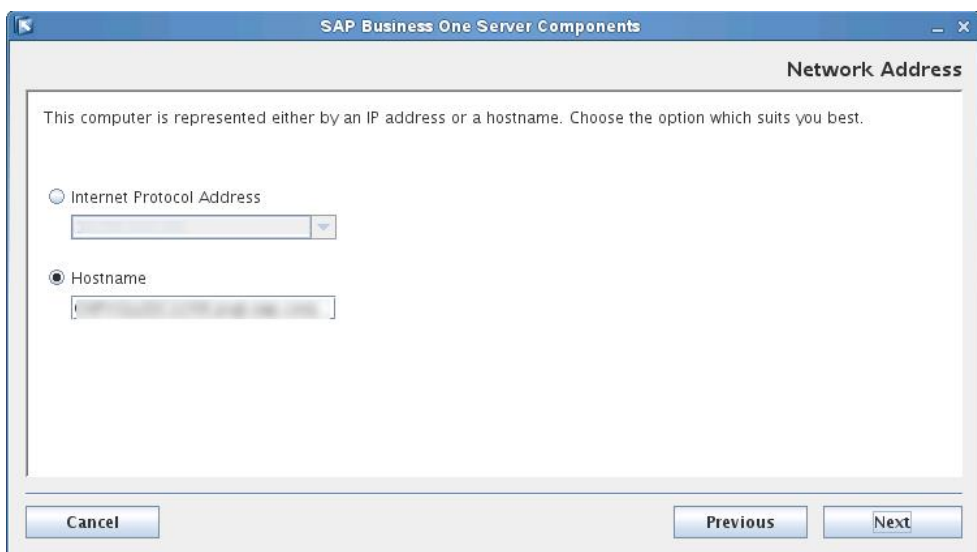
Security Certificates

During the installation, you can select to import a certificate store file (*Specify a PKCS12 certificate store and certificate password* option) or have the installer generate a self-signed certificate (*Use a self-signed certificate* option) for the System Landscape Directory, Analytics Platform and Mobile Service.

We recommend that you use a purchased certificate (for example, PKCS12 certificate).



If you choose the *Use a self-signed certificate* option, be sure to use the hostname rather than the IP address when specifying the server. The host name must be the Linux server hostname, which can be accessed by the mobile devices.



3.2 Required Licenses

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

- Professional users
- Limited CRM users
- Starter Package users
- Mobile users

3.3 Installing and Setting Up SAP Business One Sales App

1. Download and install SAP Business One Sales app to your iPhone from Apple App Store by searching for "SAP Business One Sales".
2. Once you open the SAP Business One Sales app on your iPhone, you see the following screen:

SAP Business One Sales
Version: 1.0.0

User Code
manager

Password
Password

Login

Setting

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3. Before adding your user code and password, choose the [Settings](#) button. This will open the [Setting](#) screen wherein you will need to add your server address and port number.

If you do not know the server address, ask your IT administrator to look it up in the System Landscape Directory control center.

4. Select the database you would like to work with and choose the *Save* button.
Alternatively, you can switch on the *Demo System* button to work with a trial version.

3.4 Deploying Certificates

To ensure the highest security standard for your company and your business data, SAP introduced the exclusive use of valid SSL certificates. In SAP Business One, the System Landscape Directory and the Service Layer components enforce secure connection via HTTPS encryption. You need to ensure that your mobile device is also secured by the certificates.

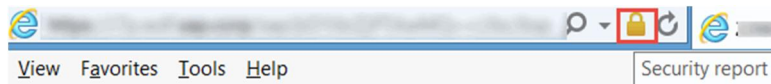
- Purchased certificate (Recommend):
We recommend that you use a purchased certificate (for example, PKCS12 certificate). If you use a purchased certificate, you normally don't need to deploy the certificate to your mobile device. If you are asked to do so, please contact your certificate vendor.
- Self-signed certificate:
If you use a self-signed certificate, you must first export the certificates that you used for System Landscape Directory, Mobile Service, and Analytics Platform, and then import them to your mobile device.

Note

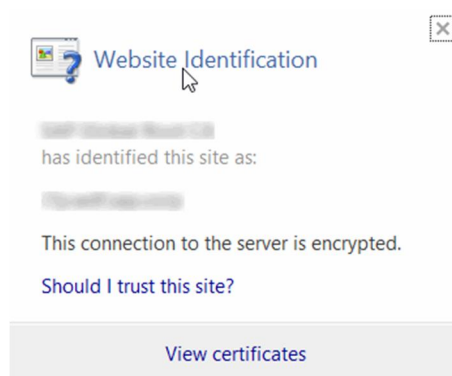
If you have used different certificates for these services, you must repeat the export and import procedures for each certificate.

To export a certificate, perform the following steps:

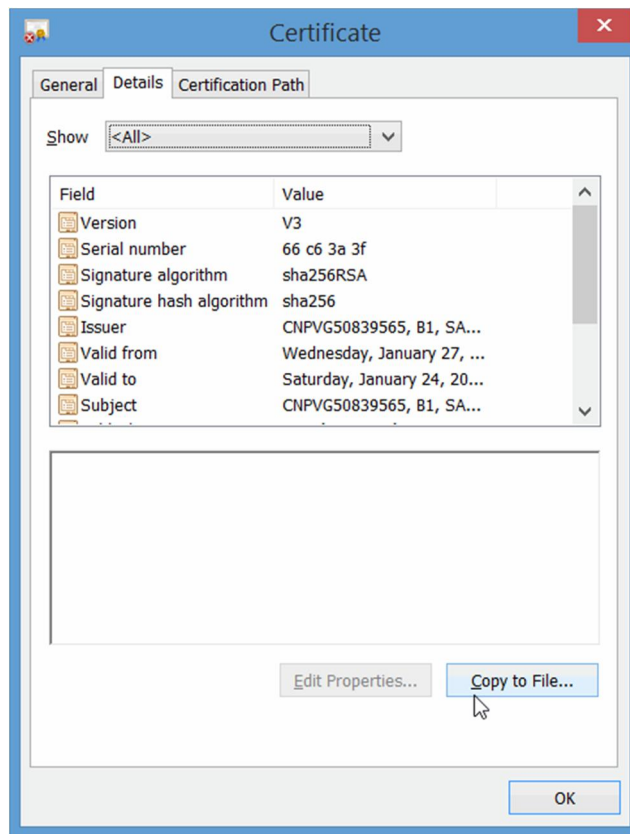
1. In a Web browser, enter the URL for the System Landscape Directory, Mobile Service or Analytics Platform and press **Enter**.
2. In the Web address bar, click the security report icon.



3. Click [View certificates](#).



4. In the *Certificate* window, on the *Details* tab, choose *Copy to File*.



5. In the *Certificate Export Wizard* window, choose *Next*.
6. Select the *DER encoded binary X.509 (.CER)* format, and choose *Next*.
7. Enter a name for the file and the location (including the entire path), or click *Browse*, navigate to the location, and then enter the file name.
8. Click *Finish*.

To import a certificate to your iPhone, perform the following steps:

1. Email the certificate file to your iPhone.
2. Click the email attachment to install the certificate.

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