SAP Business One
Guide

PUBLIC

SAP Business One for iPhone and iPad

Release Family 8.8

Applicable Release:

SAP Business One 8.82 PL03, SAP Business One for iPhone and iPad 1.5.x

English

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THE BEST-RUN BUSINESSES RUN SAP™

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Introduction

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

Key features:

- **Approvals and alerts** – Get alerts on specific events – such as deviations from approved discounts, prices, credit limits, or targeted gross profits – and view approval requests waiting for your immediate action. Drill into the relevant content or metric before making your decision.
- **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.
- **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, and search for sales quotations, sales orders, and sales opportunities.
- **Dashboards** – View predefined dashboards (sales analysis, cash flow, and purchase quotations) in normal and full-screen mode and share them via e-mail.
- **Service** – Process and close service calls, create and view solutions, and look up related service calls from service contracts or customer equipment cards.
- **Help** – Display either a standard or a customer-specific help document.

Requirements for SAP Business One solution:

- SAP Business One 8.82 patch level (PL) 03 or higher

  Note

  You can use SAP Business One mobile app 1.5.x with older versions of SAP Business One (such as SAP Business One 8.81) however latest functions introduced in mobile app 1.5.x will not work. When accessing such function, a pop-up window appears, informing the user that the desktop application must be upgraded to enable the selected function. All mobile app functions that were supported by the older version of SAP Business One still work.

- Integration component for SAP Business One (SAP B1i)

  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.

  For **security** reasons, the SAP Business One mobile app 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.

  Throughout this document we describe the features and functions of the SAP Business One mobile app for **iPhone** and **iPad**. The mobile app also runs on the **iPod** touch**.** This document shows where functionality and user interface elements, such as buttons or menu items, are different between these devices.

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 for iPhone and iPad. These tasks are performed in the SAP Business One.

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 UDID 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 UDID, consult the product documentation supplied with your Apple device, ask your vendor, or search for instructions on the Web.
5. Choose the *Update* button and then choose *OK*.

Setting Up Licenses

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 for iPhone and iPad 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 Mobile App Function Availability Based on B1 License Type

To assign a user a Bi1 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.

Note

The mobile app supports only reports created with SAP Crystal Reports that have no interactive features, such as defining selection criteria or drilling down to master data.

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.

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://channel.sap.com/sbo/innovations, where you can also find sample code.

Activating the B1i Mobile Scenario

After completing setup and configuration tasks in SAP Business One and on the iPhone or iPad, 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 for iPhone and iPad on an iPhone, iPad, or iPod touch, 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 iPhone, 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.

Note

The *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 iPhone.
2. On the *Settings* page, tap *Business One*.
3. On the *Settings* page for SAP Business One, specify the following information:
   - *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.
   - *SSL*: To use SSL (https) between SAP Business One and your iPhone, 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.
   - *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 for iPhone and iPad, see SAP Note 1606567 (in the *Get Support* area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer.)
   - *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
     - 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.
     - If you specify a user code in this field, when you log on to the app you need to enter only your password.
   - *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
   - *Demo System*: When the demo system is *ON*, the logon dialog offers the user access to the public demo system.

     Note

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

Using the SAP Business One App

Starting Page

Note

- After you log on to the mobile app, the starting page appears.
- 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.
- 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:
    - i. Open the integration framework Web page and choose *Scenarios* → *Authentication*.
    - ii. From the *User Def. Author. Identifier* dropdown list, choose *sap.B1Mobile*.
    - iii. 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.
    - iv. Click 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 Tab

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 Application for iPhone* located at http://channel.sap.com/sbo/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. 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 *Administrator* → *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 the 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 delete user-defined modules, add user-defined modules, and change the display sequence of modules.

To manage modules, choose *Edit*:

- 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:
  a. On the left of the toolbar, tap .
  b. Tap the module that you want to add.
  c. 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 Application for iPhone* located at http://channel.sap.com/sbo/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.

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 its number or the name of the business partner for whom it 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.

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.
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.

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*.

   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 .
2. 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.

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.

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

Managing Reports in the Reports Module

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

Viewing Reports

1. In the *Modules* tab, tap *Report*s.
   The list of available reports appears.
2. Tap the report that you want to view.
   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.
3. 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*.
   - To delete a report, tap in front of it, and then tap *Delete*. To cancel the deletion, tap .
   - To add either a new report or a report that was deleted:
     a. Tap .
     b. Tap the report that you want to add.
     c. Tap *Save*.
   - 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 view, update, add, and search for business partner information.

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 20 business partners appear. To view the next 20 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:

   - *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. Any user-defined fields are displayed on this tab in a separate section.
   - *Addr/Contacts* – Displays the default contact person and the default ship-to and bill-to addresses.
   - *Transactions* – Tap the relevant category to view the documents or transactions created for the business partner:
     - *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*.
     - *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.
     - *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 +.

3. 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:
   a. To add a contact, tap , specify the information, and tap *Done.*
   b. To edit an existing contact*,* tap , make the changes, and tap *Done*.
   c. 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. 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.
   - 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 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 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 opportunities, sales quotations, and sales orders by using the relevant module:

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

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.
   - For sales opportunities, the *Opportunity Info* page displays opportunity details such as business partner, status, stage, and so on.

- The *Info* page for sales order and sales quotation contains four tabs: *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:
  - *Header* tab – Document number, currency, status, business partner details, dates, total values, and user-defined fields, if any exist
  - *Contents* tab
    - For an item type document:

      Each row has a summary row on this tab, including item description, item code, and quantity. 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.
    - For a service type document:

      Each row in the sales order has a summary row on this tab, including description and line total. Line total is displayed in document currency. To view row details, tap the row. The *Details* page appears.
  - *Logistics* tab – Bill-to and ship-to addresses and shipping type, if defined. To see a map and get directions, tap the relevant address.
  - *Accounting* tab – Payment terms and payment means defined for the document

Searching for Sales Documents

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

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*.

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 are indicated by the ghost text *Required*.
3. To specify the business partner for whom the document is created, tap *Business Partner*.

   The list of business partners appears.
4. Select the relevant business partner and tap *Done*.

   The main contact person of the selected business partner is automatically populated in the *Contact Person* field.
5. To specify the document currency, tap the *Currency* field.

   The list of available currencies appears.
6. Tap the required currency and then tap *Done*.
7. To add items to the document, tap *Item.*

The *Items* page appears.

8. Tap ⊕, select the required item, and specify the required quantity. To add more items to the document, repeat steps 7 and 8.
9. Specify any other relevant information.
10. To add the document, tap *Save*.

Viewing Dashboards in the Dashboards Module

In the *Dashboards* module, you can view predefined dashboards for:

- Sales analysis
- Cash flow
- Purchase quotations

In addition, you can:

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

To access the *Dashboards* module, you must have authorization to view a dashboard.

Viewing Sales Analysis Dashboard

1. On the *Modules* tab, tap *Dashboards*.
   The *Dashboards* page appears.
2. To view sales analysis dashboards, tap *Sales Analysis*.
   The *Sales Analysis* page appears. It 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* of 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.

   To maximize a chart, double-tap the chart. To return to the *Sales Analysis* home page, double-tap the maximized chart.
3. To return to the SAP Business One mobile app home page, tap *Close*.

Viewing Cash Flow Dashboard

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

The *Dashboards* page appears.

2. To view cash flow dashboards, tap *Cash Flow*.

   The *Cash Flow* page appears. It 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.

   To maximize a chart, double-tap the chart. To return to the *Cash Flow* home page, double-tap the maximized chart.

3. To return to the SAP Business One mobile app home page, tap *Close*.

Viewing Purchase Quotations Dashboard

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

   The *Dashboards* page appears.

2. To view purchase quotations dashboards, tap *Purchase Quotations*.

   The *Purchase Quotations* page appears. It 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*.

   To maximize a chart, double-tap the chart. To return to the *Purchase Quotations* home page, double-tap the maximized chart.

3. To return to the SAP Business One mobile app home page, tap *Close*.

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.

4. You can draw with your finger on that view if needed. 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 corner.

Configuring the Data Cache

You use the same data cache functionality in SAP Business One and for 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, to enable the data cache, select 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, select 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:
   - 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.
   - 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.
   - 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 Call 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 are displayed. 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
     i. To view the activities created for the service call, tap *Activities*.
     ii. On the *Activities List* page, tap an activity to view its details.
   - Solutions created and assigned to the service call
     i. To view solutions created and assigned to the service call, tap *Solutions*.
     ii. On the *Solution* page, tap a solution to review its details.
3. To return to the list of service calls, *tab 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.

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.
   - To add an activity:
     i. Tap *Activities*.
     ii. On the *Activities List* page, tap .
     iii. On the *Add Activity* page, specify the activity details and tap *Save*.
   - To add a solution:
     i. Tap *Solutions*.
     ii. On the *Solutions List* page, tap .
     iii. 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 for iPhone and iPad - 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, an administrator 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 Authorization Required	Permission Set Up 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 business partner	Full Authorization	*Adding Customer/Vendor Master Data* section in *Authorizations* window
Add lead business partner	Full Authorization	*Adding Lead BP* section in *Authorizations* window
View business partner	Read Only	*Business Partner Master Data* section in *Authorizations* window
Add activity	Full Authorization	*Activity* section in *Authorizations* window
Edit activity	Full Authorization	*Activity* section in *Authorizations* window
View activity	Read Only	*Activity* section in *Authorizations* window
View item	Read Only	*Item Master Data* section in *Authorizations* window

Action	Minimum Authorization Required	Permission Set Up in SAP Business One
View price list	Read Only	*Price Lists Group #* section in *Authorizations* window
View special price list[1]	Read Only	*Special Prices for Business Partners* section in *Authorizations* window
View sales opportunity	Read Only	*Sales Opportunities* section in *Authorizations* window
Add sales opportunity	Full Authorization	*Sales Opportunities* section in *Authorizations* window
View sales order	Read Only	*Sales Order* section in *Authorizations* window
Add sales order	Full Authorization	*Sales Order* section in *Authorizations* window
View sales quotation	Read Only	*Sales Quotation* section in *Authorizations* window
Add sales quotation	Full Authorization	*Sales Quotation* section in *Authorizations* window
View dashboard	Full Authorization	*Dashboard* section in *Authorizations* window
View service contract	Read Only	*Service Contract* section in *Authorizations* window
View customer equipment card	Read Only	*Customer Equipment Card section in Authorizations window*
View service calls	Read Only	*Service* Section in *Authorizations* window
Process service calls	Full Authorization	*Change Status* in *Special Service Call Authorizations* section in *Authorizations* window
View key performance indicator (KPI)[2]	Read Only	*Query Generator* section in *Authorizations* window

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 B1 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.

[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.

[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.

- 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.

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