SAP Business One Guide

The SAP Business One Mobile Application for iPhone and iPad

Release Family 8.8

Applicable Release:

SAP Business One 8.81, SAP Business One Mobile Application 1.3.x

English

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THE BEST-RUN BUSINESSES RUN SAP™

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Introduction

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

Key features:

- Alerts and approvals – 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 down into the relevant content or metric before making your decision.
- Reports – Refer to built-in reports created with SAP Crystal Reports that present key information about your business. Add your own customized reports to the application, and easily share them via e-mail.
- Business partners – Access and manage your customer and partner information including addresses, phone numbers, and contact details; view historical activities and special prices; create new business partners and log new activities; contact or locate partners directly. All changes are synchronized automatically with the SAP Business One backend.
- Stock information – Monitor inventory levels, and access detailed information about your products including purchasing and sales price, available quantity, product specifications, and pictures
- Sales opportunities – Search for, view, and monitor sales opportunities; view business partner and contact person information (can also be done in the *Business Partners* module)
- Sales orders – View sales order information and search for sales orders (can also be done in the *Business Partners* module)
- Sales quotations – View sales quotation information and search for sales quotations (can also be done in the *Business Partners* module)
- Dashboards– View predefined dashboards (sales analysis and cash flow) in normal and full screen mode

Requirements for the backend:

- SAP Business One 8.81 patch level (PL) 07 or higher
- Integration component for SAP Business One

> 💡 **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.

> 💡 **Note**
>
> For security reasons, the SAP Business One mobile application neither stores nor caches business data on the device. It does not support any offline use. A server connection needs to be established in order to open and use the app.

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

Configuring the SAP Business One Server

This section explains the tasks of the system administrator in setting up and managing the SAP Business One mobile application. These tasks are performed in the SAP Business One backend server.

Setting Up Licenses in the Backend

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.

The SAP Business One mobile application for iPhone is available for all SAP Business One named user types (excluding SAP Business One Web CRM User, SAP Business One Add-on Access User, and SAP Business One Indirect Access Users) with no additional license fee.

To use the mobile application, you need any one of the following five SAP Business One user license types:

- Professional
- Limited Financial
- Limited Logistics
- Limited CRM
- Starter Package

Setting Up Users in the Backend

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 then select the *Mobile User* checkbox.
3. In the *Mobile Phone* field, enter the user's mobile phone number. The number you enter must exactly match the number and format (such as country code) in the SAP Business One user administration. This mechanism is used for security reasons.

   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. Make or adjust the other settings for this user, as required.
6. To save your settings, choose *Add* or choose *Update* and then *OK.*

Function-Level Authorizations for Users to Work with the App

The *Modules* tab of the mobile application displays the ten modules provided by SAP, as well as any other additional modules. For SAP-provided modules, the mobile application retrieves authorization settings from the SAP Business One server, controlling accessing, viewing, adding, and editing data. As of SAP Business One 8.81 PL05, the mobile application supports function-level authorization.

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	Full Authorization	Read Only	No Authorization	Permission Set Up in SAP Business One
View SAP Crystal Reports	Y	N/A	N	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 then the user cannot view the report using the mobile application.
Add customer or vendor business partner	Y	N/A	N	*Adding Customer/Vendor Master Data* section in *Authorizations* window
Add lead business partner	Y	N/A	N	*Adding Lead BP* section in *Authorizations* window
View business partner	Y	Y	N	*Business Partner Master Data* section in *Authorizations* window
Add activity	Y	N	N	*Activity* section in *Authorizations* window
Edit activity	Y	N	N	*Activity* section in *Authorizations* window
View activity	Y	Y	N	*Activity* section in *Authorizations* window
View item	Y	Y	N	*Item Master Data* section in *Authorizations* window

Action	Full Authorization	Read Only	No Authorization	Permission Set Up in SAP Business One
View price list	Y	Y	N	*Price Lists Group #* section in *Authorizations* window
View special price list[1]	Y	Y	N	*Special Prices for Business Partners* section in *Authorizations* window
View sales opportunity	Y	Y	N	*Sales Opportunities* section in *Authorizations* window
View sales order	Y	Y	N	*Sales Order* section in *Authorizations* window
View sales quotation	Y	Y	N	*Sale*s Quotation section in *Authorizations* window
View dashboard	Y	N/A	N	*Dashboard* 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.

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[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 application.

Configuration 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.

Procedure

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 *OK* or *Update.*

Result

The report is now visible in the report list on the mobile device.

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 App

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

Procedure

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 *Name*, *URL,* and *Provider* fields.

   NOTE

   All fields are mandatory.

3. In the *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 *OK.*

More Information

See the how-to 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.

Installing the SAP Business One App

To download and install the SAP Business One mobile application on an iPhone, iPad, or iPod touch, go to Apple App Store and search for SAP Business One, or follow this link:
http://itunes.apple.com/app/sap-business-one-mobile-application/id392606876?mt=8.

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 backend system, if no backend server is configured, the mobile application accesses a public demo server, offering demo data and all functions except editing or adding data.

1. Tap *Settings* on your iPhone.
   The *Settings* page appears.
2. Tap *Business One.*
   The *Settings* page for SAP Business One appears.
3. Specify the following information:
   - o *Server*: Server address and port (either IP or server name) in the format
     `<server>:<port>`

     ### 💡 Note

     Default ports of integration solutions for SAP Business One are 8080 (http) and 8443 (https).
   - o *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.
   - o *Company DB*: Company database you want to connect to (mandatory field). The mobile app logs on to this company. For details about the company database concept in the SAP Business One mobile application, see Note 1606567 in the *Get Support* area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer.
   - o *User Code*: User code of the SAP Business One company, the database assigned to the mobile Web service; 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 only need to enter 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.

     ### 💡 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 application, the starting page appears.
> - For the first logon, the *Home* tab page appears. For later logons, the page where you logged off appears.
> - If you change settings and then go back to the mobile application, a warning message appears in a pop-up window informing you that settings have changed and that you have to log on to the application 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 application 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.
>   iv. Click the *Save* button*.*

You can access all functions of the mobile application 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*.

A to-do list and the real-time information of key performance indicators (KPIs) appear:

- *To-Do List* displays the maximum of the next three activities (iPhone) or next six activities (iPad) in your SAP Business One calendar. You can tap any activity for details and also for editing. To synchronize the activities in the most recent three months (last month, this month and next month) into the device calendar, choose ![icon] near the to-do list. 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.
- *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.
- *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*.

Note

You can create an add-on for the *Home* tab, such as a gauge, showing the percentage by which the revenue deviates from the target. For more information, see the how-to 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.

Modules Tab (iPhone) or Modules Menu (iPad)

The SAP Business One mobile application for iPhone provides ten modules: *Approval*, *Alert*, *Report*, *Business Partners*, *Stock, Price List*, *Sales Opportunities*, *Sales Order*, *Sales Quotation*, and *Dashboards*.

Note

You can create additional modules according to your needs. For more information, see the how-to guide *How to Create Add-Ons for the SAP Business One Mobile Application for iPhone* located at http://channel.sap.com/sbo/innovations.

Managing Modules

The *Modules* tab (iPhone) or modules menu (iPad) displays two separate groups: the ten 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.

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.

1. Tap *Edit*.

   o To delete a user-defined module, tap 🔴 in front of it, and then tap *Delete*.

   Note

   You can add back deleted user-defined modules.

   o To add a user-defined module:

      i. On the left of the toolbar, tap 📁.
      ii. Tap the module that you want to add.
      iii. On the right of the toolbar, tap *Save*.

   o 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.

   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.

2. To return to *Modules*, tap *Done*.

Viewing and Working with Documents in the Approval Module

In the *Approval* module, you can:

- View documents in the approval process
- Approve or reject documents in the approval process

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

Viewing Documents

1. In the *Modules* tab, tap *Approval*.

   A list of documents appears. A maximum of 50 most recent documents is displayed.

   To change the way documents are listed, tap *by Date* or *by Type*.

   To update the document list, tap 🔄.

   > **Note**
   >
   > To hide all approved and rejected documents, shake your mobile device. To unhide the
   >
   > approved and rejected documents, tap 🔄.

2. Tap the document that you want to view.

   The *Approval Info* page appears. You can tap related fields for more information, for example, information about business partners.

3. To return to the list of documents, tap *Approvals*.

Approving or Rejecting Documents

1. In the *Modules* tab, tap *Approval*.

   A list of documents appears. For more information about display options, see Viewing Documents.

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 Alert Module

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

Note

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

1. In the *Modules* tab, tap *Alert*.

   A list of alerts appears. A maximum of most recent 50 alerts is displayed. To change the way documents are listed, in the toolbar, 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, to view the information of another alert, tap the up or down arrow.

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

Managing Reports in the Report Module

In the *Report* module, you can:

- View reports
- Add reports
- Delete reports
- Change the display sequence of reports
- Send reports to colleagues and others by e-mail

   ### Note

   You can only manage the reports that SAP Business One provides.

Viewing Reports

1. In the *Modules* tab, tap *Report*.
   The *Reports* page appears. It displays all the available reports.

2. Tap the report that you want to view.
   The chart and detailed information in the report appear.

   ### Note

   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*.

Deleting Reports, Adding Reports, and Changing the Display Sequence of Reports

1. In the *Modules* tab, tap *Report*.

    The *Reports* page appears and displays all the available reports.
2. Tap *Edit*.

    o   To delete a report, tap 🔴 in front of it, and then tap *Delete*.

    💡 **Note**

    You can add back the deleted reports.

    o   To add a report:

    i.   Tap 📁.

    ii. Tap the report that you want to add.

    iii. 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. In the *Modules* tab, tap *Report*.

    The *Reports* page appears and displays all the available reports.
2. Tap the report that you want to send.

    The chart and detailed information in the report appear.
3. Tap *Send*.

    The *New Message* page appears.
4. 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.
5. 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 business partner and activity information
- Edit business partner and activity information
- Add business partners and activities
- Search for business partners

Viewing Business Partner Information

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

   The *Business Partners* page appears. It displays a list of business partners sorted alphabetically by business partner name. 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.

   > **Note**
   >
   > User-defined fields are shown in the last section of the *General* tab in *BP Info* page.

   Tap the following elements on this page:

   - *General*
     - *Telephone* to call or send SMS
     - *E-Mail* to send an e-mail
     - *Web Site* to access the business partner's Web site
   - *Addr/Contacts*
     - *Main Contact* to view information of the main contact
     - *All Contacts* to view all contacts. The default contact is marked in bold.
     - *Bill to/Ship to Address* to see a map and get directions to an address.
     - *All Addresses* to view all addresses. The default addresses are marked in bold.
   - *Transactions*
     - *Activities:* The *Activities List* page appears.
       - 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:* The *Special Price* page appears. It 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 its price list.
- *Opportunities* to view opportunities with this business partner
- *Sales Quotations* to view sales quotations for this business partner
- *Sales Orders* to view sales orders for this business partner

3. To return to the list of business partners, on the left of the toolbar, tap *Back*.

Editing Business Partner Information

1. On the *Modules* tab, tap *Business Partners*.
   The *Business Partners* page appears. For more information about the display options, see Viewing Business Partner Information.

2. Tap the business partner whose information you want to edit.
   The *BP Info* page appears.

3. Tap *Edit*.
   The *Edit BP* page appears.
   Tap the following elements on this page:
   - *Main Contact:* The *Main Contact* page appears*.*

     - To add an contact, tap and specify the information. On the right of the toolbar, tap *Done.*

     - To edit an existing contact*,* tap and make the changes. On the right of the toolbar, tap *Done.*

     - To select an existing contact person as the default contact person for this business partner, tap the name of the contact person. A ✔ appears in front of the name.

   - *Bill to/Ship to:* The *Bill to/Ship to* page appears*.*

     - To add a bill-to or ship-to address, tap and specify the information. On the right of the toolbar, tap *Done.*

     - To edit an existing bill-to or ship-to address*,* tap and make changes. On the right of the toolbar, tap *Done.*

     - To select an existing bill-to or ship-to address as the default address of this business partner, tap the address. A ✔ appears in front of the address.

4. After making your changes, tap *Save.*

Adding Business Partners

1. On the *Modules* tab, tap *Business Partners*.
   The *Business Partners* page appears. For more information about the display options, see Viewing Business Partner Information.

2. Tap .
   The *Add BP* page appears.

3. Specify the information and tap *Save.*

Searching for Business Partners

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

   The *Business Partners* page appears. For more information about the display options, see Viewing Business Partner Information.

2. At the top of the *Business Partners* page, tap the search field to bring up the keyboard.

3. Type the keywords of the business partner and tap *Search*.

   A list of business partners whose names or codes contain the keywords appears.

Viewing and Searching for Items in the Stock Module

In the *Stock* module, you can:

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

Viewing Information About Items in Stock

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

   The *Stock* page appears. It displays a list of items 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.

   Notef

   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 *Stock Info* page appears. It displays detailed information about the item.

   Note

   User-defined fields are shown in the *Stock Info* page.

   o To view the item picture, tap the placeholder picture.

   o To view the price list of the item, tap *Unit Price*.

   o To view stock quantity of the item by warehouse, tap *Stock Qty*. For each warehouse you see the quantity of the item in stock, committed, ordered, and available.

Searching for Items in Stock

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

   The *Stock* page appears. For more information about the display options, see Viewing Information About Items in Stock.

2. In the *Stock* page, tap the search field to bring up the keyboard.

3. Type one or more keywords for the item and tap *Search*.

   A list of items that have item codes or descriptions containing these keywords appears.

Viewing Price Lists in the Price List Module

In the *Price List* module, you can view price lists in SAP Business One.

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

   The *Price List* page appears. It displays the price lists in SAP Business One together with their respective base price lists, factors, and authorization groups. To refresh the list, use your finger and drag it from the top of this list.

2. Tap the price list that you want to view.

   The chosen price list page appears. It displays the items and their prices in the specific price list, together with their prices in the base price list. You can view item information and search for items in stock. For more information, see Viewing and Searching for Items in the Stock Module.

Viewing and Searching for Opportunities in the Sales Opportunities Module

In the *Sales Opportunities* module, you can:

- View sales opportunities information
- Search for sales opportunities

Viewing Sales Opportunities Information

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

   The *Opportunities* page appears. It displays a list of sales opportunities sorted in descending order by *Start Date*. By default, the 20 most recent sales opportunities 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

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

2. To view information about a sales opportunity, tap the opportunity.

   The *Opportunity Info* page appears.

    Note

   Only authorized users can access the *Opportunity Info* page. If a user does not have authorization to view a sales opportunity according to data ownership authorizations settings, an error message that the user cannot get document details appears when the user taps the opportunity.

   You can also view opportunities in the *Business Partners* module.

   The *Opportunity Info* page contains information about the opportunity. You can also access additional details about the following:

   o *Business Partner*

      To view the business partner, tap the name. The *BP Info* page appears.

   o *Contact Person*

      To view the contact person, tap the name. The *Contact Info* page appears.

3. To return to the list of sales opportunities, on the left of the toolbar, tap *Sales Opportunities*.

Searching for Sales Opportunities

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

   The *Opportunities* page appears. For more information about the display options, see Viewing Sales Opportunities Information.

2. At the top of the *Opportunities* page, tap the search field to access the keyboard.

3. Type the keywords of the sales opportunity and tap *Search*.

   A list of the sales opportunities with opportunity name, business partner code, or business partner name containing the keywords appears.

Viewing and Searching for Sales Orders in the Sales Order Module

In the *Sales Order* module, you can:

- View sales order information
- Search for sales orders

Viewing Sales Order Information

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

   The *Orders* page appears. It displays a list of sales order sorted in descending order by *Doc No.* By default, the 20 most recent documents are displayed. To view the next 20 sales order, tap *Load More…* at the bottom of the list. To refresh the list, pull down the list at the top of the list.

   In the list you can view the following information of the sales order:

   o *Doc No.*

   o *Business Partner*

   o *Status*

   ### Note

   Sales orders with a status of *Open* have an orange side bar in the front of the order.

   o *Posting Date*

2. To view information about a sales order, tap the sales order.

   The *Order Info* page appears.

   ### Note

   Only authorized users can access the *Order Info* page. If a user does not have authorization to view a sales order according to data ownership authorizations settings, an error message that the user cannot get document details appears when the user taps the sales order.

   You can also view sales orders in the *Business Partners* module.

   The *Order Info* page contains four tabs, *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:

   o *Contents* tab

   ▪ For an item type sales order:

   Each row in the sales order 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 sales order:

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.

o *Logistics* tab

Bill To: Tap this field to see a map and get directions.

Ship To: Tap this field to see a map and get directions.

3. To return to the list of sales orders, on the left of the toolbar, tap *Sales Order*.

Searching for Sales Orders

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

The *Orders* page appears. For more information about the display option, see Viewing Sales Order Information.

2. At the top of the *Orders* page, tap the search field to access the keyboard.

3. Type the keywords of the sales order and tap *Search*.

A list of the sales orders with business partner code, business partner name, item code, or item description containing the keywords appears.

Viewing and Searching for Sales Quotations in the Sales Quotation Module

In the *Sales Quotation* module, you can:

- View sales quotation information
- Search for sales quotations

Viewing Sales Quotation Information

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

The *Quotations* page appears. It displays a list of sales quotations sorted in descending order by *Doc No.* By default, the 20 most recent documents are displayed. To view the next 20 sales quotations, tap *Load More…* at the bottom of the list. To refresh the list, pull down the list at the top of the list.

In the list you can view the following information of the sales quotation:

o *Doc No.*

o *Business Partner*

o *Status*

Note

Sales quotations with a status of *Open* have an orange side bar in the front of the quotation.

o *Posting Date*

2. To view information about a sales quotation, tap the sales quotation.

The *Quotation Info* page appears.

Note

Only authorized users can access the *Quotation Info* page. If a user does not have authorization to view a sales quotation according to data ownership authorizations settings, an error message that the user cannot get document details appears when the user taps the quotation.

You can also view sales quotations in the *Business Partners* module.

The *Quotation Info* page contains four tabs, *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:

- o *Contents* tab
  - For an item type sales quotation:

    Each row in the sales quotation 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 sales quotation:

    Each row in the sales quotation 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.
- o *Logistics* tab

  Bill To: Tap this field to see a map and get directions.

  Ship To: Tap this field to see a map and get directions.

3. To return to the list of sales quotations, on the left of the toolbar, tap *Sales Quotation*.

Searching for Sales Quotations

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

   The *Quotations* page appears. For more information about the display option, see [Viewing Sales Quotation Information](#).

   At the top of the *Sales Quotation* page, tap the search field to access the keyboard.

2. Type the keywords of the sales quotation and tap *Search*.

   A list of the sales quotations with business partner code, business partner name, item code, or Item description containing the keywords appears.

Viewing Dashboards in the Dashboards Module

In the *Dashboards* module, you can:

- View predefined sales analysis dashboards
- View predefined cash flow dashboards

If a user does not have authorization to view a dashboard, the user cannot access the *Dashboards* module.

Viewing Sales Analysis Dashboards

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 closed opportunities 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 application home page, tap *Close*.

Viewing Cash Flow Dashboards

1. In the menu, tap *Dashboards*.
   The *Dashboards* page appears.

2. To view cash flow dashboards, tap *Cash Flow*.
   The *Cash Flow* page appears. It contains the following information:

   o *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.

   o *Cash Flow Details* displays the five transactions with the largest amounts for the selected period sorted in descending order by amount.

   o *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 application home page, tap *Close*.

Managing User-Defined Fields

User-defined fields (UDFs) are widely used to record essential information in master data and transactions. There are no UDFs in reports and alerts.

The mobile application retrieves UDFs and displays them on mobile devices.

A user can do the following:

- Edit UDFs in business partners and activities
- View UDFs in approvals
- View UDFs in business partner, activity, contact information, sales order, sales quotation, opportunity, and item

A user must have full authorization to add or edit UDFs for business partners and activities. A user must have full authorization or read-only authorization to view relevant master data (business partner, activity, item, and price lists).

More Information

Further information can be found on SDN by referring to the *Troubleshooting Guide for B1ic* (the integration component of SAP Business One):
http://www.sdn.sap.com/irj/scn/weblogs?blog=/pub/wlg/20300.

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