Working with SAP Business One Mobile App for iOS

Applicable Releases: SAP Business One 9.1 PL05 and later, SAP Business One 9.1 PL05, version for SAP HANA and later, SAP Business One Cloud 1.1 PL02 and later, SAP Business One mobile app 1.11.x for iOS

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1 Introduction

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

Key features:

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

Requirements for mobile devices:

You are using iPhone or iPad with iOS updated to iOS 7.0 and higher. SAP Business One mobile app 1.11.x for iOS is not supported by lower versions of iOS.

Requirements for SAP Business One solution:

- You have installed one of the following:
  - SAP Business One 9.1 (PL) 05 or higher
  - SAP Business One 9.1, version for SAP HANA (PL) 05 or higher

> **i Note**
>
> SAP Business One mobile app 1.11.x for iOS is also available when using SAP Business One Cloud 1.1 (PL) 02. For further information, see the *SAP Business One Cloud Administrator's Guide*.

> **i Note**
>
> You can use SAP Business One mobile app 1.11.x for iOS with older versions of SAP Business One (such as SAP Business One 8.81) however latest functions introduced in mobile app 1.11.x will not work. When accessing such function, the following message appears: "*Note that this function is not supported by the current version of the backend server*." All mobile app functions that were supported by the older version of SAP Business One still work.

- You have installed Integration component for SAP Business One (B1iC)

> **i Note**
>
> SAP Business One creates a user with B1i user code for each company database. The default process requires that you set the same password for each company database. The integration framework uses the B1i user to connect to SAP Business One, for example for authentication when using the mobile solution. Make sure that the password that you have provided during integration framework installation is the same that you set in SAP Business One.

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

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

2 Configuring the SAP Business One Solution

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

2.1 Configuring Mobile App Users

To enable SAP Business One users to use the mobile app, follow the procedures below.

2.1.1 Retrieving the Mobile Device ID

Entering your mobile device ID in to your user setup in SAP Business One is mandatory. Follow the steps below to retrieve the device ID of your iOS device.

Procedure

1. Download SAP Business One mobile app for iOS to your iOS device, from Apple App Store by searching for SAP Business One. Alternatively, follow this link http://itunes.apple.com/app/sap-business-one-mobile-application/id392606876 🖈 or use the QR code:

2. Tap the SAP Business One icon on your iOS device. A system message appears, saying that Apple MAC address is no longer supported, and that the Device ID which is displayed is used instead.
3. Tap *Email*. An email message containing the device ID in the email body appears. Enter your email address in the *To* field, and tap *Send*.
4. Tap *OK*.

   > **i Note**
   >
   > New switch is added to the SAP Business One settings page on your iOS device, named Email Device ID. By default, it is switched on. Once you send the email with the Device ID as described above, this switch is automatically turned off.

2.1.2 Activating Mobile App Users

Procedure

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. If you intend to use SAP Business One mobile app on a device which is not a mobile phone and where you have no number, choose a fictitious mobile phone number.
4. In the *Mobile Device ID* field, enter the device ID of your iOS device. This field is mandatory. For more information see Retrieving the Mobile Device ID [page 7].
5. To enable a user to use the app by two different mobile devices, enter the device ID of both devices. Use "/" as the separator. For example: `AE45FG67816ET98ZV6523BNH8I /1QAZXSW23EDCVFR45TGB678YHN`.

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

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

> **i Note**
>
> If you are working with SAP Business One Cloud 1.0 or higher, choose the *Send Mobile Settings* button. An e-mail with a hyperlink containing all configuration details will be sent automatically to the mobile device of the given user. For more information, see the *Configuring Mailer* and *Registering Integration Components* sections in the SAP Business One Cloud Administrator's Guide, and the Configuring the SAP Business One Mobile App When Working with SAP Business One Cloud [page 16] section in this guide.

2.2 Setting Up License

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

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

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

- CRM Service User (standalone, legacy license type)

For more information about the mobile app functions available for each license type see the Mobile App Function Availability Based on SAP Business One License Type [page 63] section in this document.

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

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

2.3 Configuring for SAP Crystal Reports on SAP Business One

Context

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

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 *Update*.

   > i Note
   >
   > The resolution of the mobile device determines how the report is displayed. Check whether the report is suitable for displaying on a mobile device.
   >
   > For example, iPhone 4 currently supports a resolution of 960x640 pixels, while the iPad supports 1024x768 pixels

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

This topic shows you how to enable viewing SAP Crystal reports deployed on SAP Business One analytics powered by SAP HANA in the mobile app.

Prerequisites

- You are running SAP Business One analytics powered by SAP HANA 1.1 or higher.
- You are running SAP Business One 8.82 PL12 or higher, or SAP Business One 9.0 PL04 or higher.
- You are running SAP Business One mobile app 1.9.3 or higher for iOS, or 1.0.1 or higher for Android.

Context

If you are using SAP Business One analytics powered by SAP HANA and would like to enable viewing in the mobile app SAP Crystal reports which are deployed on SAP Business One analytics powered by SAP HANA, proceed as follows:

Procedure

1. Step 1: Configuring Integration Framework for SAP Business One [page 10]
2. Step 2: Editing Connection String [page 11]

2.4.1 Step 1: Configuring Integration Framework for SAP Business One

Procedure

1. In the *Integration Framework for SAP Business One* page, choose: ▶ *SLD* ❯ *B1i Server* ❯ *B1A Server* ❯ *Edit* ❯.
2. Change the HTTA information under *Connectivity List (Active)* as follows:

   destHost: **<B1A Server>**
3. Choose *Save*.
4. Choose ▶ *SLD* ❯ *B1i Server* ❯ *B1A DB* ❯ *Edit* ❯

5. Under *Connectivity List (Active)*, update the JDBC information as follows:

    ○ *Driver*: `com.sap.db.jdbc.Driver`
    ○ *URL*: `jdbc:sap://<B1A Server>:30015?`
      `currentschema=<Schema>;databaseName=<Database Name>;`
    ○ *Username*: `<Your SAP HANA Database User Code>`
    ○ *Password*: `<Your SAP HANA Database Password>`

6. Choose *Save*.

2.4.2 Step 2: Editing Connection String

Procedure

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

> ⚭ Example
>
> Connection String: `DRIVER=`
> `{HDBODBC32};UID=SYSTEM;PWD=Password;SERVERNODE=192.168.1.4:30015;DATABASE=SBO`
> `DEMO`;
>
> Command: `SELECT "ItemCode", "ItemName" FROM "SBODEMO"."OITM"`

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

2.5 Configuring for SAP Crystal Reports Based on SAP HANA

Context

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

Procedure

1. Open the report in the SAP Crystal Reports for SAP Business One designer. Choose either the B1CRHPROXY connection for 64 bit, or B1CRHPROXY32 for 32 bit from ▶ *Data* ❯ *Available Data Sources* ❯

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

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

> **⁂ Example**
>
> Connection String: `DRIVER {B1CRHProxy32};UID=SYSTEM;PWD=Password;SERVERNODE=192.168.1.4:30015;DATABASE= SBODEMO;`
>
> Command: `SELECT "ItemCode", "ItemName" FROM "OITM"`

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

2.6   Setting Up Add-Ons to Run Within the Mobile App

Context

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 *Code*, *Name*, *Entry URL*, and *Provider* fields.
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. In the *View Style* field, specify the relevant view:
   ○ *Page-Universal* - for add-on that works on both iPhone portrait mode and iPad page sheet mode (similar to *Home* Type view)
   ○ *Full Screen - iPad* - for add-on that works only on iPad portrait and landscape mode
   ○ *Landscape Only - iPad* - for add-on that works only on iPad landscape mode
5. In the *Logon Method* field, specify whether the add-on requires authentication for logon:
   ○ *B1i Framework* -Select this option if add-on back-end scenarios are implemented on B1i Framework and the same session ID will be shared with this add-on.
   ○ *Standard Logon* - Select this option for add-on that requires user logon authentication. In this case a logon message box appears asking for user name and password.

○ *No Control* - select this option for add-on that does not require any authentication to be provided by SAP Business One, or for add-on that controls independently everything that has to do with authentication.

6. 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 https://partneredge.sap.com/en/products/business-one/about/sbo-mobile.html, where you can also find sample code.

2.7 Configuring the SAP HANA Server

Context

> **i Note**
>
> This section is relevant only when working with SAP Business One, version for SAP HANA;.

Procedure

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

> **♣ Example**
>
> The URL for accessing the B1A Administration Console is: https://<IP Address>:40000/Enablement the above mentioned fields are filled in as follows:
> ○ *destProtocol*: `https`
> ○ *destHost*: `10.58.114.44`
> ○ *destPort*: `40000`

3. Choose *Save*.

2.8 Configuring the B1i Mobile Scenario

Context

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

Procedure

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. Make sure that the test connection between the B1i Server and the company database of your mobile app is successful. Perform the following actions:

   From ▶ *SLD* ❯ *B1i Server* ◀, choose the company that your mobile app connects to. Make sure that the password is correct. Choose the *Test Connection* button in the *B1DI* and *JDBC* area.

   > **i** Note
   >
   > In case you cannot find the company database, see 2032666 .
   >
   > If the test connection is not successful, you may need to go to the SAP Business One client to reset the password for the **B1i user**. For more information, see 2029714 .

4. Make sure that the value in the *associatedSrvIP* field is the same as that in *b1Server*.

   The *associatedSrvIP* field locates in the *WSAR* area from ▶ *SLD* ❯ *B1i Server* ❯ *WSforMobile* ◀.

   The *b1Server* field locates in the *B1DI* area from ▶ *SLD* ❯ *B1i Server* ◀ to your company database.

5. Make sure that the B1A server name (value in the *destHost* field) is the same as the name used to generate the certificate. This is only relevant to view SAP HANA features in Android devices.

   The *destHost* field locates in the *HTTA* area from ▶ *SLD* ❯ *B1i Server* ❯ *B1A Server* ◀, Make sure that the *destHost* domain can be accessed from external network.

   For more information, see 2048889 , point 6.

6. Make sure the *sap.B1Mobile* scenario is active (By default, *sap.B1Mobile* is activated.)

   Choose ▶ *Scenarios* ❯ *Control* ◀. In the *Scenario List*, make sure the *sap.B1Mobile* checkbox is selected.

3   Configuring the SAP Business One Mobile App

Context

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

Procedure

1. Tap *Settings* on your iOS device.
2. On the *Settings* page, tap *Business One*.
3. On the *Settings* page for SAP Business One, specify the following information:

   - *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 iOS device, choose *ON*.
     This setting must comply with the protocol and assigned ports on the server side.

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

     > i 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.
     The name must be the same as the one you used to generate certificate. For details about the company database concept in SAP Business One mobile app for iOS, see 1606567 .
   - *User Code*: Used to log on to the SAP Business One company database specified in the *Company DB* field.
     - If you are using an on-premise solution and have not enabled Single Sign-On (SSO), it is the value of the *User Code* field in the *Users - Setup* window in SAP Business One.
     - If you are using an on-demand solution, or if you are using an on-premise solution and have enabled SSO, it is the value of the *Bind with Microsoft Windows Account* field in 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.

- 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.

> **i Note**
>
> Starting from SAP Business One 9.0 PL12, the field *Phone Num* is informative only and its value is not validated against the phone number entered in the *Mobile Phone* field of the *Users - Setup* window in SAP Business One.

- o *Email Device ID*: switched on by default. It enables you to send the device ID by e-mail to yourself before logging on to the mobile app. See Configuring the SAP Business One Solution [page 7] for more information.
- o *Demo System*: When the demo system is *ON*, the logon dialog offers the user access to the public demo system. You can set the demo server to *Germany - powered by SAP HANA* (in ▮▶ *Device Settings* ❭ *Business One* ❭ *Demo Server* ❭ field).

> **i Note**
>
> The app uses the language that you use on your device. All SAP Business One languages are supported.

3.1 Configuring the SAP Business One Mobile App When Working with SAP Business One Cloud

Procedure

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

3.2 Verifying the Connection Between Mobile Device and B1i Server

Context

Make sure that the integration framework server is accessible from your mobile device.

Procedure

1. Copy the URL from the integration framework server.

    Log on to the integration framework, choose ▌▶ *Scenarios* ❯ *Control* ◀▌. From the *sap.B1Mobile* scenario, choose *Trigger*. Copy the URL including the port number, for example, `https://<server_ip_address>:8443`.

    > **i Note**
    >
    > `<server_ip_address>` must be the same as the server setting in the mobile app setting.

2. Paste the URL in the browser of the mobile device.

    If the logon page of the integration framework is displayed, it means the integration framework can be pinged successfully from the mobile device. Otherwise, you get an error message: *XCL198 HTTP-access currently not allowed from remote clients, as B1iP runs in local-mode or safe-mode*.

    For more information, see 1776825 .

    > **→ Recommendation**
    >
    > For security reasons, it is not recommended to use the http connection and port 8080.
    >
    > If you use http and port 8080, you must switch off SSL in your mobile device. At the same time, you must also change the *Enforce Secure Transport* field to false and reactivate the *sap.B1Mobile* package. Perform the following steps:
    >
    > 1. Log on to the integration framework, choose ▌▶ *Scenarios* ❯ *Authentication* ◀▌.
    > 2. In the *User-defined Authentication Identifier* field, specify the *sap.B1Mobile* package. In the *Enforce Secure Transport* field, select *false*.
    > 3. Reactive the package by choosing *Control* tab, deselect the *sap.B1Mobile* package and select it again.

3.3 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 (Recommended):
    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, import the certificate created for the integration framework server to your mobile device.
    For examples of how to obtain and install valid certificates, see SAP Note 2019275 .

3.4 Troubleshooting: SAP HANA Features Don't Work in SAP Business One Mobile App

This topics shows you what to do when some SAP HANA features do not work in the SAP Business One mobile app.

Context

When using the SAP Business One mobile app, you find that the following SAP HANA features do not work:

- Cash Flow Forecast
- Enterprise Search
- Pervasive Dashboard
- Delivery Reschedule
- ATP check
- Dashboard (Sales Analysis)

Procedure

- If you are running SAP Business One 9.0 PL09 Hotfix 1, version for SAP HANA, see SAP Note 2012800 .
- Otherwise, proceed as follows:

1. Verify that SAP Business One analytics powered by SAP HANA is installed on the SAP HANA server.

2. Ensure that the SAP Business One company has been initialized in the SAP HANA Analytics Platform Server. If you encounter any issue with company initialization and/or re-initialization, please log an incident with component *SBO-HANA-ANA*.

   a. Log in to the SLD (URL: https://`<SAP HANA Server Address>`:`<Port Number>`/ControlCenter/)

   b. Go to the *Services* tab, find the URL of SAP HANA Analytics Platform Server and open it in your browser.

3. Ensure that the IP address and host name entry for the integration framework server is correct in the server hosts file of SAP Business One analytics powered by SAP HANA (default directory: `/etc/hosts`). You can run the following query to check the correct host name: **select SLSPP."ParamValue" from slsp, slspp where SLSP."CompID"=SLSPP."CompID" and SLSP."CompType"='b1isrv' and SLSPP."ParamKey"='host';**

4. Check that the dashboard is visible in the SAP Business One client.

   a. Log in to the SAP Business One client.

   b. Go to ▶ *Administration* ⟩ *System Initialization* ⟩ *General Settings* ⟩ *Cockpit* ◀, choose ▶ *Cockpit* ⟩ *More...* ◀ and enable the dashboard.

   c. Choose ▶ *Tools* ⟩ *Cockpit* ⟩ *Enable My Cockpit* ◀.

   d. Log out of the SAP Business One client, then log in again to check if the dashboard is visible.

5. Go to the *Integration Framework for SAP Business One* page, choose ▶️ *Scenarios* ▶ *Control* ◀ to verify that the *sap.B1Validate* package is active. The package is required to connect to SAP HANA Analytics Platform Server.

6. In the *Integration Framework for SAP Business One* page, choose ▶️ *SLD* ▶ *B1A Server* ◀ to check if the values for *destProtocol*, *destHost* and *destPort* are correct. Ensure that you can access the URL of SAP HANA Analytics Platform Server from the browser of the mobile device and from the integration framework server. Use the same protocol, server address and port number set in Step 2, for example https://<HANAAnalyticsServerAddress>:40000/Enablement/. If accessing the system , use the Analytics service configured protocol, public server address and port in the External Address Mapping of the SAP Business One System Landscape Directory (SLD) for the B1A Server SLD configuration.

7. Verify the connection between the SAP HANA Analytics Platform Server and the integration framework server. If there is any connection issue, contact your local IT administrator to resolve the issue.

   a. Open putty and connect to SAP HANA Analytics Platform Server.

   b. After establishing the connection by putty, enter `curl https://<Integration Framework Server Address>:8443` in the command line. If you are using an internal address to connect from the mobile app to the integration framework, perform the test with the internal address and port. If you are also using an external address to connect from the mobile app to the integration framework, perform the test with the external address and port, too.

Related Information

SAP Note 1602674

4 Using the SAP Business One Mobile App

Logging On to SAP Business One Company Database

1. Tap the SAP Business One icon on your iOS device. One field for password or two fields for 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 Mobile App [page 15].

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

2. To log on to the company database defined in the *Company DB* field (see the Configuring the SAP Business One Mobile App [page 15] section in this document), tap *Logon*.
3. To log on to a different company database, tap *Choose Company*. The list of available company databases appears, and the default company databases is indicated by ✔.
4. Tap the company database you want to log on to and tap *OK*.

   > **i Note**
   >
   > After logging on to a different company database, the value in the *Company DB* field (see the Configuring the SAP Business One Mobile App [page 15] section in this document) is updated to the newly selected company. The selected company database becomes the default company database until you choose to log on to different company database, or manually change the company database name in the *Company DB* field.

Starting Page

> **i Note**
>
> - After you log on to the mobile app, the starting page appears.
> - For the first logon, the Home tab page appears. For subsequent logons, the page where you logged off 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:
>   1. Open the integration framework Web page and choose ▶ *Scenarios* ▶ *Authentication* ▶.
>   2. From the *User Def. Author. Identifier* dropdown list, choose *sap.B1Mobile*.
>   3. In the *Session Timeout* field, specify a value. If you enter an incorrect port for a server connection, the app times out in 75 seconds by default.

4. Choose the *Save* button.

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

- The toolbar contains menu commands, such as the *Back* button and the *Edit* button.
- The page section displays real-time information, such as key performance indicators and alerts.
- For iPhone: A horizontal tab section consists of two tabs: Home and Modules. You can tap them at any time.
- For iPad:
  - On the left side of the screen is a vertical menu section; on the right side in the content area is the display section for selected content.
  - For SAP Business One, version for SAP HANA users, the cockpit is displayed in a full screen mode (in landscape mode only) as Home page.

Home Page

In the tab section (iPhone) or menu section (iPad), tap Home. On the Home screen, every page has a ⬆ icon on the upper-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*.

> **i Note**
>
> You can create add-on pages for the *Home* tab, such as a gauge that shows the percentage by which the revenue deviates from the target. For more information, see the guide *How to Create Add-Ons for the SAP Business One mobile app for iOS* located at SAP PartnerEdge⬆ 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. In addition, you can add new activities, by tapping +.
- To synchronize the activities in the most recent three months (last month, this month, and next month) into the calendar of your mobile device, tap ⬆ and choose *Sync to Calendar*. These activities will be synchronized into a separate calendar in the mobile device named "SAP Business One". The first time you use this function within a month, full synchronization is done. During that month, whenever you use this function again, only the changed activities are synchronized.

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

- System-defined KPIs:
  - *Sales Order* displays data for the current month and the previous month, together with the percentage change.
  - *Incoming Payments* displays data for the current month and the previous month, together with the percentage change.
  - *Outgoing Payments* displays data for the current month and the previous month, together with the percentage change.

- Cash on Hand displays the balance of the account in the *Cash on Hand* field on the *General* subtab of the *Sales* tab of the *G/L Account Determination* window in SAP Business One. To define this account, choose ▐▶ *Administration* ❯ *Setup* ❯ *Financials* ❯ *GL Account Determination* ❯ *Sales* ❯ *General* ❯ *Cash On Hand* ❚.

- User-defined KPIs: You can create your own KPIs by defining customized user-defined queries in SAP Business One.

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

Each query requires seven selected fields with the following sequence:
Main Title - Growth Rate - Indicator* - SubTitle1 - SubValue1 - SubTitle2 - SubValue2
These seven items are displayed like this:

Main Title - Growth Rate - Indicator
SubTitle1 SubValue1
SubTitle2 SubValue2

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

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

4.1 Working with the Cockpit

> **i** Note
>
> This section is relevant only when using the mobile app on iPad and having SAP Business One, version for SAP HANA installed on the back-end.

When launching the mobile app on iPad, in landscape mode the cockpit is displayed in a full screen view by default. For more information about the cockpit, see: *How to Work with the Fiori-Style Cockpit* at SAP Help Portal.

- Tap and hold the relevant widget and the respective action menu, if exists, appears allowing you to launch an advanced dashboard or to trigger enterprise search.
- Tap the *Pervasive* dashboard widget to display information in a tooltip.

> **i Note**
>
> The *Recent Updates* widget is available in read-only mode .

- To make the mobile app menu visible, tap the upper left corner of the iPad. Tap any place in the cockpit or tap *Home* to return to full screen view.
- To exit the cockpit view, tap any entry on the side bar.

4.2   Managing Modules

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

Tap the ⚙ image in the top-right corner and choose *Edit*, and then tap the 🔲 image in the top-left corner to enter the *Add/Remove Modules* page:

To display your favorite SAP-provided modules, choose *Modules*. A list displaying all the SAP-provided modules appears. Tap the ones you would like to remove from your list of modules.

To add or remove user-defined modules choose the *Add-Ons* tab:

- To delete a user-defined module, tap 🔴 in front of it, and then tap *Delete*. You can add back deleted user-defined modules at any time.
- To add a user-defined module:
  1. On the left of the toolbar, tap ═ .
  2. Tap the module that you want to add.
  3. On the right of the toolbar, tap *Save*.
- To change the display sequence of modules, press and hold ═ on the right of the module that you want to move, and drag it to your desired position. To return to *Modules*, tap *Done*.

  > **i Note**
  >
  > You cannot mix SAP-provided modules and user-defined modules; that is, you can move SAP-provided modules only among SAP-provided modules and user-defined modules only among user-defined modules.
  >
  > You can create additional modules according to your needs. For more information, see the guide *How to Create Add-Ons for the SAP Business One mobile app for iOS* located at SAP PartnerEdge🔗 .

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 [page 61].

4.3 Setting Preferences per Module

Context

You can sort and set the display of different types of information in the various modules by using the *Preferences* option.

For example, you can decide that the home page would display the KPIs rather than the To Do list, and sort the sales opportunities by closing rate.

Procedure

1. At the bottom of the main page, tap *Preferences*. The *Preferences* page appears, listing all the modules in the app. On the mobile app for iPad, tap the right-top corner icon of module list and choose *Preferences*.

2. Tap the module for which you want to set or change the current preferences. The various options related to the selected module appear.

3. Make your desired changes, tap ❮. The information is sorted or displayed according to your preferences.

   You can also set preferences for user defined fields for most modules. By default, all user defined fields are displayed. You can choose to display selected user defined fields. To do so, in the list of preference options, tap the *User-Defined Fields* drill down page and switch off the *All* option. A list of user defined fields will be displayed for you to select.

4.4 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 function is available if the search icon 🔍 appears. For example, when you tap the *Service Call* module, the list of service calls is displayed. The search icon appears at the top of the page.

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

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

To perform a search, follow the steps below.

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

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

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

4.5 Using the Enterprise Search

Context

> **i Note**
>
> This option is only available for SAP Business One, version for SAP HANA, and SAP Business One, Analytics powered by SAP HANA 1.1 PL02 (used with SAP Business One 8.82 PL13 or higher, SAP Business One 9.0 PL06 or higher, or SAP Business One 9.1 PL01 or higher) and only on iPad devices.

Procedure

1. Tap the search box.

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

- ○ Service Solution
- ○ Service Call

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

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

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

4.6 Working with Sales Catalog

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

The *Sales Catalog* module enables you to:

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

4.6.1 Launching the Sales Catalog

Procedure

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

   Each card deck displays the three most sold items during the last three months of the respective item group. In case such statistics is not available for a specific item group (this can happen if no items from the given item group were sold in the last three months), the items of the specific item group are displayed and sorted according to the item number.

   > i Note
   >
   > Only items that are defined as *Sales Item* and have an image attached in *Remarks* tab in the *Item Master Data* window are represented in the *Sales Catalog* page. Alternatively, you can store the images of the items in folder defined in: ▌▶ *Administration* ❯ *System Initialization* ❯ *General Settings* ❯ *Path tab*

> *Pictures Folder* . The image name should be: `<item no.>`.png. To view items of a specific item group, tap the image of the item that appears on the required item group. This item is displayed on the whole page, providing some specific details. To refresh the displayed information, tap the Refresh icon. Thumbnails of the other items from that item group are displayed horizontally at the bottom of the page. The items that are currently in campaign appear with a yellow ribbon on right-top corner of the image. The thumbnail of the currently displayed item is highlighted. To view a different item of the same item group, tap its thumbnail.

3. To close the *Sales Catalog* page tap ▤.

4. To reset the sales catalog, tap ↻.

4.6.2 Searching for Items in the Sales Catalog

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

4.6.3 Customizing the Item Info Displayed in Sales Catalog

Context

By using the *Preferences* module you can customize the item details displayed in the sales catalog, so user defined fields and item price from selected price list are shown.

Procedure

1. Tap ⚙, and choose *Preferences*. In the *Preferences* page tap *Sales Catalog*. The *Sales Catalog* page appears.
   - To display in the sales catalog a price from price list other than the current default price list, tap *Default Price List*. A list of available price lists appears. Tap the required price list.
   - To display in sales catalog selected user defined fields, tap *User-Defined Fields*. Select the relevant user-defined fields.
   - To eliminate any of the fields: *Length*, *Width*, *Height*, *Volume*, or *Weight* which are currently displayed by default, deselect the relevant field from the list.

2. Tap back to the *Preferences* page. Then tap *Done*.

3. Return to the sales catalog, the item price from the selected price list is displayed, and is also reflected in the Compare page. In addition the values of the user defined fields (if selected) are displayed.

4.6.4 Comparing Items in the Sales Catalog

Context

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

Procedure

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

4.6.5 Working with Shopping Carts

Context

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

Procedure

1. On the *Sales Catalog* page tap the relevant item group. The image of the first item is displayed, and the other items of the same group are available as thumbnails.

2. To add the currently displayed item to a shopping cart, tap

3. The item is added to the shopping cart and a red dot with number appears on the shopping cart icon indicating that there is certain number of items in the shopping cart.

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

Context

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

Procedure

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

4.7   Managing Activities in the Activities Module

In the *Activities* module, you can:

- View a list of your activities for today.
- Synchronize the activities to the calendar on your mobile device.
- Add, edit, and close your activities which are linked to business partners, opportunities, quotations, orders, or service calls.
- Create follow up activities.

4.7.1 Viewing and Processing Existing Activities

Procedure

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

   The *My Activities* page opens, displaying today's activities on a calendar page. Activities of different types are marked by different colors. The name, start time and end time of an activity are also displayed.

   You can tap ◀ or ▶ to view activities on the previous or next day, or tap the date to open a monthly calendar view and tap a date to view activities on that day.

2. Tap an activity to view its details on the *Activity Details* page.

3. To make changes to the activity, tap ⬆, choose *Edit Activity*, and then tap *Save* to save your changes.

4. To create a follow-up activity, tap and choose . A new activity is created, containing all the information from the original activity. Make the relevant updates and tap *Save*.

5. To close an activity, tap and choose *Close Activity*. The status of the activity is set to *Closed*.

4.7.2 Adding New Activities

Procedure

1. In the *Modules* tab, tap *Activities*. A list of the existing activities for today appears.

2. Tap ⬆ and choose *Add New Activity*.

   The *Add Activity* page appears. Assign the required business partner.

3. Enter any additional details.

   > **i Note**
   >
   > ○ The available options under *Subject* field depend on the selection made in the *Type* field.
   > ○ In the *Link To* field you can assign a sales document to the activity. This option is not available when creating an activity for a vendor.

4. Tap *Save*.

4.7.3 Synchronizing Activities to Device Calendar

Context

To synchronize the activities in the SAP Business One mobile app to the calendar on your mobile device, follow the steps bellow:

Procedure

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

   The *My Activities* page opens, displaying today's activities on a calendar page.

2. Tap and choose *Sync to Calendar*.

   You can define the time span for the activities by tapping ▌▶ *Preferences* ❯ *Activity* ▌ from the home page.

4.8　Working with Documents in the Approvals Module

The *Approvals* module lists all the documents pending to your approval. The number of unread documents appears on the module entry in the *Modules* tab.

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 including travel and leave requests.

Within the list of documents, you can:

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

4.8.1　Approving or Rejecting Documents

Procedure

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

   A list of documents appears. The list can contain a maximum of 50 documents. To change the way documents are listed, tap *by Date* or *by Type*.

2. Tap the document that you want to approve or reject.

   The *Approval Info* page appears. To view the details of the document draft sent for approval, tap the *Doc. Type* field. The *Draft Detail* page appears, displaying the document draft. Tap *Back*.

3. Tap *Approve* or *Reject*.

   The *Approve* window appears.

4. Enter your remarks (optional).

5. To continue, tap *Cancel*, *Approve*, or *Reject*.

   > **i Note**
   >
   > To stop the process, tap *Cancel*.

> The message *Approved successfully* or *Rejected Successfully* appears, in addition a respective alert is sent to the user submitted the draft document for approval:
> - Request approved - the user can tap the alert, view the details of the draft document that was originally submitted for approval, and add it.
> - Request rejected - the user can tap the alert, view the remarks entered by the approver (if available) and the details of the draft document that was originally sent for approval.

4.9 Viewing Alerts in the Alerts Module

Context

In the *Alerts* module, you can view real-time alerts from SAP Business One, sorted by date, type, or priority. The number of unread alerts appears on the module entry in the *Modules* tab.

Procedure

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

   A list of alerts appears. A maximum of the most recent 50 alerts are displayed.

   To change the way documents are listed, in the tool bar tap *by Date*, *by Priority*, or *by Type*. To update the list of alerts, tap the refresh icon ↻ .

   > **i** Note
   >
   > To hide the alerts you have viewed, shake your device. To unhide the viewed alerts, tap the refresh icon.

2. Tap the alert that you want to view.

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

   > **i** 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*.

4.9.1 Submitting Leave or Travel Requests for Approval

Context

You can submit leave request and travel request for management approval. To use this functionality, you have to define first a respective workflow template in the back end. For more information see the guide: *How to Configure the Workflow Service and Design the Workflow Process Templates* at SAP Help Portal.

Procedure

1. Tap the *Self Service* module. The *Employee Self Service* page appears.
2. Tap *Add Leave Request* or *Add Travel Request* (as required). The respective page appears.
3. Enter all relevant information, and tap *Send*. The leave or travel requests are sent to the approving manager(s) and appear in the *Approvals* module.

4.10 Managing Business Partner Data in the Business Partners Module

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

4.10.1 Filtering Business Partners

You can filter and view a list of business partners in the *Business Partners* module by business partner type.

Tap one of the following filter conditions to view a list of business partners of the corresponding type:

- *My* - to display all the business partners in which the defined sales employee or buyer is the current user
- *Lead* - to display a list of business partners of type *Lead*
- *Customer* - to display only business partners of type *Customer*
- *Vendor* to display only business partners of type *Vendor*

The filter condition you apply is remembered by default the next time you enter the *Business Partners* module.

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

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

4.10.2 Viewing Business Partner Information

Procedure

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

   A list of business partners sorted alphabetically by business partner name appears. By default, the first 25 business partners appear. To view the next 25 business partners, tap *Load More...* at the bottom of the list. You can scroll down to refresh the list.

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, credit limit, payment terms and price list assigned to the business partner, as well as contact details for the company, such as phone number, e-mail address, and Web site.
   You can tap the field *Telephone* to call or send an SMS message to your business partner. After you choose *Dial* `<Phone Number>`, an activity will be created automatically.

   > **i Note**
   >
   > In Brazilian companies who activated the multi-branch functionality, the BP branch is displayed as well.
   >
   > Users of SAP Business One, version for SAP HANA who have iPad devices can view in the *General* tab pervasive analysis information for the business partner. For more information, see *Pervasive Analysis* section in the *SAP Business One, Version for SAP HANA User Guide*. Any user-defined fields are displayed on this tab in a separate section, grouped by the user defined field categories.

   ○ *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 a list of activities created for the business partner
         ○ **To view an activity**, tap it. The *Activity Detail* page appears.
           To edit the activity, tap , make changes to the editable fields, and tap *Save* to save your changes.
         ○ **To add an activity**, tap ＋.
           The *Add Activity* page appears. Specify the necessary information and 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*, *Sales Orders*, and *Deliveries* – Display, respectively, the sales opportunities, sales quotations, sales orders, and deliveries created for the business partner. To create a new opportunity, sales quotation, or sales order, tap ＋ within each tab.
      ○ *Service Contract* – Displays a list of service contracts applicable to the business partner.
      ○ *Service Call* – Displays a list of service calls from the business partner by four categories.

   To return to the list of business partners, in the upper left corner of the *BP Info* page, tap ＜.

4.10.3 Editing Business Partner Information

Procedure

1. Display the business partner whose information you want to edit (see Viewing Business Partner Information [page 34]).

2. Tap *Edit*.

   The *Edit BP* page appears.

3. Tap any detail you want to edit, make necessary changes and tap *Done*.

   > ❖ Example
   >
   > To change the business partner name, tap *BP Name*. Enter a new name in the text box and then tap *Done*.
   >
   > To change the main contact for the business partner, tap *Main Contact*. The list of contacts defined for the business partner appears:
   >
   > - To add a contact, tap *New Contact*, specify the necessary information, and tap *Done*.
   > - To edit an existing contact, tap ⓘ next to the contact, make necessary changes, and tap *Done*.
   > - To select an existing contact person as the default contact person for the business partner, tap the name of the contact person. A tick appears in front of the name. Tap *Done*.
   >
   > The way to change the bill-to or ship-to address is similar to changing the main contact.

   > **i Note**
   >
   > In **Brazilian** companies who activated the multi-branch functionality: to change the currently displayed branch, tap the *Branch* field. A list of the existing branches appears. Select the required branch, and tap *Done*.

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

4.10.4 Adding Business Partners

Procedure

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

   The *Business Partners* page appears.

2. Tap ➕.

   The *Add BP* page appears.

3. Specify the necessary information and tap *Save*.

4.10.5 Synchronizing BP Contact Persons with the iOS Contacts App

Context

You can integrate the BP's contact persons details to the phone book on your mobile device. This way you gain access to contact persons information without having to log on to SAP Business One mobile app.

Procedure

1. To add contact person info to the mobile device phone book, tap the relevant contact person. The *Contact Info* page appears

2. Choose the *Sync* button. The contact person info is displayed as a phone book record.

   ○ To create a new contact person in the device phone book, tap *Create New Contact*.

   ○ To add the contact person info to an existing contact person in the phone book, tap *Add to Existing Contact*. The list of contacts that already exist in the phone book appears. Tap the required existing contact. The details of the existing contact will be updated according to the contact person details from SAP Business One mobile app.

4.10.6 Creating New Contact Person Based on Contact in the iOS Contacts App

Context

You can create a new contact person for business partner based on existing contact in your device's phone book.

Procedure

1. Open the business partner for whom you want to add the new contact person. Tap ▌▶ *Addr/Contacts* ❯ *All Contacts* ❯. The list of all contacts defined for this business partner appears

2. Tap *New Contact*, and then tap *From Address Book*. The list of contacts defined in the mobile device's phone book appears.

3. Choose the contact you want to add as a contact person for the given business partner.

4. Tap *Done*.

4.11   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)

4.11.1 Viewing Information about Items in Inventory

Procedure

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.

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.

4.12   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.

4.12.1 Viewing Price List Details in the Price Lists Module

Procedure

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.

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

4.12.2 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 [page 24].

4.13 Managing Sales Documents in SAP Business One Mobile App

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

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

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

4.13.1 Viewing Sales Document Information

Procedure

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.

   > **i 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, sales quotation, and delivery contains four tabs: *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:

- *Header* tab – Document number, currency, sales employee, customer reference number, 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, quantity, unit of measure, items per unit, and user-defined fields if exist. To view row details, tap the row. The *Details* page appears.

  To view detailed information of the item, tap *Item*. The *Stock Info* page appears.

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

  For a service type document:

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

4.13.2 Updating Sales Documents

Context

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

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

Procedure

1. Display the sales quotation or sales order you need to update.
2. Tap and choose *Edit Quotation (or Order)*.

   The document is switched to the *Edit* mode.
3. Make all the changes required.

> **i Note**
>
> When editing an existing item, you can check the available quantity of the item as follows:
>
> 1. In the *Quantity* field of the item details page, tap ⓘ.
> 2. The *Inventory by Warehouse* page appears, displaying the total available, in-stock, ordered, and committed quantities in all warehouses, as well as in each warehouse separately.
> 3. To return to the *Items* page, tap ❮.
>
> When editing an item for a Sales Quotation, you can optionally specify the item as an alternative item.

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

> **i Note**
>
> The following values cannot be modified:
> o Customer code and customer name
> o Document currency

4.13.3 Cancelling Sales Documents

Context

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

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

Procedure

1. Display the sales quotation or sales order you want to cancel.
2. Tap ⬆.
3. Choose *Cancel Quotation* or *Cancel Order* (depends on the selected document)
4. A warning saying that the action is irreversible appears. To complete the cancellation, tap *OK*. The status of the document is set to *Canceled*.

4.13.4 Copying Sales Quotations to Sales Orders

Context

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

Procedure

1. Display the sales quotation you want to copy into a sales order.
2. Tap ⬆️.
3. Tap *Copy to Order*. The *Add Sales Order* page appears, displaying all the information taken from the selected sales quotation.
4. To add the sales order based on the sales quotation, tap *Save*.
5. The sales order is saved and the status of the sales quotation which serves as the base document is set to *Closed*.

4.13.5 Sending/Printing/Sharing Sales Documents

Context

You can send, print, and share sales quotations and sales orders by using SAP Crystal print layout. To do so, follow the steps below.

Procedure

1. Display the sales document and tap ⬆️.
2. Tap *Layout*. The print preview of the selected document using the default SAP Crystal layout appears.
3. Tap *Send*, and then choose to e-mail, print, copy or share the sales document.

4.13.6 Searching for Sales Documents

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

4.13.7 Filtering Sales Quotations, Sales Orders, and Deliveries

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

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

- To view only documents created and owned by you, tap *My*.
- To view only documents with status *Open*, tap *Open*.
- To clear the filter and display all documents, tap *All*.

> **i** Note
>
> The *My* option is available only if the current user, who is logged on to the app, has an employee master data record that is linked to the current user code.
>
> When initiating a search after applying a filter, the search applies to the filtered list, and not to all existing documents.

4.13.8 Creating Sales Quotations and Sales Orders

Context

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

Procedure

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 Order* or *Add Sales Quotation* page appears.

   Mandatory fields and mandatory user-defined 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 field *Doc. Series* displays the default numbering series defined for the sales quotation or sales order. To assign to the document different numbering series, tap this field. A list of all available numbering series appears. Tap the numbering series you want to assign to this document.
   - The main contact person and the default sales employee of the selected business partner are automatically populated in the respective fields. To assign a different contact person or sales employee

to the document, tap the relevant field. A list of the available contact persons or sales employees appears. Tap the required contact person or sales employee and then tap *Done*.

- ○ The BP currency is automatically populated in the *Currency* field. In case there is more than one currency defined for the BP, the first one is populated by default. To assign to the document a different currency, tap the *Currency* field. The list of available currencies appears. Tap the required currency and then tap *Done*.
- ○ In the logistics section, the default *Ship To* and *Bill To* addresses appear. You can select other predefined addresses by tapping the address or edit manually the displayed addresses by tapping the information icon ⓘ.

5. To add items to the document, tap *Item*.

   The *Items* page appears.

6. Tap *Choose Item*, select the required items (you can select multiple items from the list), tap *Done* and specify the required quantity for each item. Tap *Done* to save your changes.

   To check the available quantity of the item in the warehouse, in the *Quantity* field of the item details page, tap ⓘ. The *Inventory by Warehouse* page appears, displaying the total available, in-stock, ordered, and committed quantities in all warehouses, as well as in each warehouse separately. To return to the *Items* page, tap *Back*. To add more items to the document, repeat steps 5 and 6.

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

7. Specify any other relevant information.
8. Tap *Save* to add the document.

4.13.9 Submitting Drafts of Sales Quotations and Sales Orders for Approval

Context

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

> **i Note**
>
> This functionality is available only if the checkbox *Activate Approval Procedures in DI* is selected in
> ▶ *Administration* ❯ *System Initialization* ❯ *General Settings* ❯ *BP* ▶ tab.

Procedure

1. Create and save a sales quotation or sale order as described in Creating Sales Quotations and Sales Orders [page 42].

2. A system message appears, notifying you that an approval is required.

3. Enter any relevant remarks and tap *OK*. To return to the document, tap *Cancel*.

4. A draft of the sales quotation or sales order is created and sent for approval.

4.13.10 Managing Activities for Sales Documents

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

Related Information

Managing Activities in the Activities Module [page 29]

4.13.10.1 Viewing Activities Related to Sales Documents

Procedure

1. Display the relevant sales quotation or sales order and choose the *Header* tab.

2. Tap *Activities*.

3. A list of all the activities created for the displayed document appears. Closed activities appear in gray. Tap an activity to view its details.

4.13.10.2 Adding New Activities to Sales Documents

Context

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

Procedure

1. Display the sales quotation or sales order to which you need to add the new activity.

2. Choose the *Header* tab, and then tap *Activities*.

3. The list of activities related to the selected document appears. Tap +.

4. The *Add Activity* page appears, containing the details of the customer for which the document is created. Add the activity details and save the activity.

Adding New Activities [page 30]

4.13.10.3 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*.

Procedure

1. Display the list of activities related to the relevant sales quotation or sales order (see Viewing Activities Related to Sales Documents [page 44]).
2. Display the activity you need to update and edit.
3. Make all required changes and save the changes.

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

Related Information

Viewing and Processing Existing Activities [page 30]

4.13.10.4 Closing Activities Related to Sales Documents

Context

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

Procedure

1. Display the list of activities related to the relevant document (see Viewing Activities Related to Sales Documents [page 44]).

2. Tap the activity you want to close. The *Activity Details* page appears.

3. Tap ⬆.

4. Tap *Close Activity*. A confirmation message appears. To close the activity, approve the message.

4.14 Managing Sales Opportunities

In the *Sales Opportunities* module you can:

- View, edit, create, and search for sales opportunities
- View, edit, and create stages for sales opportunities

4.14.1 Viewing Sales Opportunities

Procedure

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

   A page listing the existing sales opportunities, filtered by status appears. The sales opportunities are sorted in descending order by document number. For each opportunity in the list you can see the business partners to whom it was created, its status, the date of creation, and the closing rate. By default, the 20 most recent sales opportunities of the selected status are displayed. To view the next 20 sales opportunities, tap *Load More...* at the bottom of the list. To refresh the list, pull down from the top of the list.

   > **i** Note
   >
   > By default, sale opportunities with status *Open* are displayed. To display sales opportunities of status *Won* or *Lost*, tap the corresponding tab. To display all the sales opportunities, tap *All*.
   >
   > When initiating a search, the search applies to the filtered list only, and not to all of the existing sales opportunities.
   >
   > Sales opportunities in *Open* status have orange side bars in front of their sales documents.

2. Tap a sales opportunity to view its details.

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

4.14.2 Editing Sales Opportunities

Context

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

Procedure

1. On the *Modules* tab, tap *Sales Opportunities*. The list of existing sales opportunities appears.
2. Tap the sales opportunity you want to edit. The *Opportunity Info* page appears, displaying the details of the selected sales opportunity.
3. Tap and choose *Edit*. Make necessary changes and tap *Save*..

4.14.3 Creating Sales Opportunities

Procedure

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*

4.14.4 Searching for Sales Opportunities

To search for specific sales opportunity, follow the steps described in Searching in the Mobile App [page 24].

4.14.5 Viewing Stages Related to Sales Opportunities

Context

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

Procedure

1. Display the 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:
   - *Closing Rate*
   - *Potential Amount*
   - *Stage* - displays the stage name
   - *Stage Start Date* and *Stage Close Date*
   - *Sales Employee*
   - *Remarks*
   - *Document* - if the stage is related to a specific sales document (sales quotation or sales order), this field displays the document type and its number. To view the related document, tap the field.
   - *Activities* - tap to view the list of activities related to this stage. You can also add or update the activities in latest stage.

4.14.6 Adding New Stages to Sales Opportunities

Context

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

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

Procedure

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

4. Tap *Save*..

4.14.7 Setting Status of an Open Sales Opportunity to Won or Lost

Context

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

Procedure

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 for the sales opportunity.

> **i 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.

4.15 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 scanning an item's barcode for a serial number.

> **i Note**
>
> Scanning supports only barcode 39.

4.15.1 Viewing Service Contracts

Procedure

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.

> **i 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*.

4.15.2 Searching for and Viewing Customer Equipment Cards

Context

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 on your iPhone or iPad.

Procedure

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 ⬆.
   - To search by the serial number, tap *Search Serial Number*, enter a serial number, and tap *OK*.
   - To use a scanned-in barcode, tap *Scan Serial Number*. Use the camera of your iPhone or iPad to scan 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*.

4.16 Viewing and Processing Service Calls in the Service Calls Module

In the Service Call module, you can:

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

4.16.1 Viewing Service Call Details

Procedure

1. In the *Modules* tab, tap *Service Call*.

   The *Service Call* page appears. It displays a list of service calls, sorted in descending order by date. By default, the most recent 20 service calls with status Open are displayed. To view all of the existing service calls, tap *All*; To view only service calls with status *Pending*, tap *Pending*. To view only service calls assigned to you, tap *My*. For service calls with status *Open* or *Pending* the creation date is considered; for closed service calls, the *Closed On* date is considered.

   To view the next 20, tap *Load More*... at the bottom of the list. To refresh the list, pull down at the top of the list.

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

   In the *Service Call Info* page, you can view the following:
   - Business partner details
   - Relevant customer equipment card
   - Details about the item for which the call was created
   - Call status and priority
   - Activities created and assigned to the service call
     1. To view the activities created for the service call, tap *Activities*.
     2. On the *Activities List* page, tap an activity to view its details.
   - Solutions created and assigned to the service call
     1. To view solutions created and assigned to the service call, tap *Solutions*.
     2. On the *Solution* page, tap a solution to review its details.

3. To return to the list of service calls, tab *Back*.

4.16.2 Picking Up Service Calls

Context

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

Procedure

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 [page 51]. Service calls with status *Open* have orange side bars in the front of them.
3. Tap the service call you want to pick up.
4. On the *Service Call Info* page, tap 📤 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.

4.16.3 Closing Service Calls

Procedure

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 [page 51]. Service calls with status *Open* have orange side bars in the front of them.
2. Tap the service call you want to close.
3. On the *Service Call Info* page, tap 📤 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.

4.16.4 Adding New Activities and Solutions to Service Calls

Context

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

Procedure

1. Display the relevant service call.
   - To add an activity:
     1. Tap *Activities*.
     2. On the *Activities List* page, tap ✛.
     3. On the *Add Activity* page, specify the activity details and tap *Save*.

        > **i Note**
        >
        > If you create a *Meeting* activity, *Address* field is added enabling to enter the meeting location.

   - To add a solution:
     1. Tap *Solutions*.
     2. On the *Solutions List* page, tap ✛.
     3. On the *Add Solution* page, fill in the solution details and then tap *Save*.
2. To return to *Service Call* page, tap *Back*.

4.17 Viewing Dashboards in the Dashboards Module

Using the *Dashboards* module, you can view a list of predefined dashboards.

> **⁙ Example**
>
> - *Sales Analysis* – 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*.
>
>   > **i Note**
>   >
>   > *Fiscal Year Analysis and Opportunity Win Rate* display general sales performance.
>
>   - *Top 5 Customers* – displays the top five customers selected by current fiscal year revenue.
>   To view details about a customer, tap *Sales Amt* or *Gross Profit* associated with the customer. The *Item Ranking and Opportunities Status* charts are updated for the selected customer.

- ○ *Item Ranking* – displays the top five items for the selected customer in the current fiscal year.
- ○ *Opportunities Status* – displays opportunities by status for the selected customer.

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

- *Cash Flow* – 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.

  > **i** Note
  >
  > This dashboard is only available when working with SAP Business One 8.81 PL(07) and higher. When working with SAP Business One, version for SAP HANA, this dashboard is replaced by the *Cash Flow Forecast* dashboard, which is available on iPad devices only.

- *Purchase Quotations*– contains the following charts:
  - ○ *Purchase Quotation Overview* – displays the overview of purchase quotations in three categories (*Responded*, *Partial/No Response*, *Overdue*). To view the purchase quotation details, tap each section of the pie chart.
  - ○ *Purchase Quotation Detail* – displays detailed information on purchase quotations according to the selected category. The default category is *Partial/No Response*.
- *Cash Flow Forecast* – available only when using SAP Business One mobile app 1.8.x for iOS and higher on top of SAP Business One, version for SAP HANA, and on iPad devices only. This dashboard provides you detailed information about your company's incoming and outgoing cash flows. For more information, see the *Using Cash Flow* section in the *SAP Business One, Version for SAP HANA User Guide*.
- *User Defined Pervasive Dashboards* – available only when using SAP Business One mobile app 1.9.x for iOS or higher on top of SAP Business One 9.0, version for SAP HANA or higher, on both iPad and iPhone devices. If you created pervasive dashboards by using the pervasive analysis designer, you can view them in the *Dashboards* module. These dashboards are listed after the predefined dashboards.
- *Advanced Dashboards* – available only when using SAP Business One mobile app 1.11.x for iOS or higher on top of SAP Business One 9.1 PL05, version for SAP HANA and higher

In addition, you can configure the refresh settings of the data cache for mobile dashboards.

4.17.1 Viewing a Selected Dashboard

Procedure

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

   The *Dashboards* page appears.
2. Tap the dashboard or the advanced dashboard that you want to view.

   The respective dashboard page appears, containing the relevant charts.
3. To maximize a chart, double-tap the chart. To return to the dashboard home page, double-tap the maximized chart.
4. To return to the SAP Business One mobile app home page, tap ‹ .

4.17.2 Sending Dashboards by E-Mail

Prerequisites

An e-mail account has been configured in the *Mail* app on your device.

Procedure

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

   The *Dashboards* page appears with a list of dashboards.
2. Tap the dashboard that you wan to send.

   A dashboard page appears.
3. Tap *Send* in the upper right corner.

   The *Draw and Send* view appears.

   You can draw with your finger on this view if needed. To clear the drawing, double-tap the view.
4. Tap *Send* in the upper right corner to send the dashboard by e-mail.

4.17.3 Configuring the Data Cache

Context

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

Procedure

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

4.18 Managing Reports in the Reports Module

In the *Reports* module, you can generate reports, add, delete, copy, share and print the reports, and change the display sequence of the reports.

> **i** Note
>
> The availability of these functions may vary according to your iOS version.

4.18.1 Generating Reports

Procedure

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

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

5. To return to the list of reports, tap *Reports* (in iPad, tap *Done*).

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

Procedure

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

   A 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 anywhere but *Delete*.
   ○ To add either a new report or a report that was deleted:
      1. Tap ▢ in the upper-left corner.
      2. Tap the report that you want to add.
      3. Tap *Save*.
   ○ To change the display sequence of reports, tap and hold ═ near the report that you want to move and drag it to the desired position.
3. To return to the *Reports* page, tap *Done*.

4.18.3 Copying and Sharing Reports

Prerequisites

To send a report by e-mail, an e-mail account has to be configured in advance in the *Mail* app on your device.

The availability of the following functions may vary according to your iOS version.

Procedure

1. Display the report you want to save or share.
2. Tap *Send*.

   ○ To share the report via AirDrop with another iOS device, tap the AirDrop icon and select the device.
   ○ To copy the report to another app, tap the app and follow the system instructions.
   ○ To send the report by e-mail, tap the *Mail* app.
     The *New Message* page appears with the report already attached to the message body as a PDF.
      1. 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.

2. Enter a subject and a message (optional) and tap *Send*.
○ [For iOS 11 or later] To save the report to your device, tap *Save to Files* and follow the system instructions.

4.18.4 Printing Reports

Prerequisites

You have prepared an available AirPrint printer.

Procedure

1. Display the report you want to print.
2. Tap *Send* and then tap *Print*. Select an available AirPrint printer and specify the number of copies.
3. Tap *Print*.

4.19 Managing Attachments

You can view, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls.

The Attachments entry is added as follows:

- To the *General* tab in the *BP Info* and *Item Info* pages
- To the *Activity Details* in *Activity*
- To the *Opportunity Info* in *Sales Opportunity*
- To the *Header* tab in sales documents
- To the *Service Call Info* in *Service Call*

4.19.1 Viewing Attachments

Procedure

1. Open the relevant document or object and navigate to the *Attachments* entry. Tap *Attachments*.
2. The *Attachments* page appears, listing the attached files. Touch and hold the attachment file you want to view.
3. Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears.

4. Select the required program. The selected attachment file is displayed.

4.19.2 Uploading Attachments

Prerequisites

Before adding an attachment, please ensure that it is virus-free.

Context

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

Procedure

1. Open the document or object to which you want to add an attachment. Tap *Attachments*.
2. The Attachments page appears. 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*.

4.20 Integrating Customized Help

Context

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 framework (B1iF).

Procedure

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'`.

5 Appendix

More Information

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

- 1618978 - B1ic_Troubleshooting Guide for B1ic Installation
- 1602674 - SAP Business One mobile app for iOS - Troubleshooting Guide

5.1 Function-Level Authorizations for Users to Work with the App

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

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

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

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

Action	Minimum Required Authorization	Permission Setup in SAP Business One
View SAP Crystal Reports	Full Authorization	A user needs authorization in SAP Business One to view each report. If a user does not have authorization to view a report in SAP Business One, the user cannot view the report using the mobile app.
Add customer or vendor	Full Authorization	*Adding Customer/Vendor Master Data* section in *Authorizations* window
Add lead	Full Authorization	*Adding Lead BP* section in *Authorizations* window

Action	Minimum Required Authorization	Permission Setup in SAP Business One
View Leads	Full Authorization	▶ *Business Partner Type* ❭ *Leads in the Business Partners* ❭ section in the *Authorizations* window
View Customers	Full Authorization	▶ *Business Partner Type* ❭ *Customers* ❭ in the *Business Partners* section in the *Authorizations* window
View vendors	Full Authorization	▶ *Business Partner Type* ❭ *Vendors* ❭ in the *Business Partners* section in the *Authorizations* window
View account balance and credit limit in the *BP Info* page	Read Only	*BP Balances* in the *General* section in the *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
View price list	Read Only	*Price Lists Group #* section in *Authorizations* window
View special price list	Read Only	*Special Prices for Business Partners* section in *Authorizations* window
View sales opportunity	Read Only	*Sales Opportunities* section in *Authorizations* window
Add/Update sales opportunity	Full Authorization	*Sales Opportunities* section in *Authorizations* window
View sales order	Read Only	*Sales Order* section in *Authorizations* window
Add/Update sales order	Full Authorization	*Sales Order* section in *Authorizations* window
View sales quotation	Read Only	*Sales Quotation* section in *Authorizations* window

Action	Minimum Required Authorization	Permission Setup in SAP Business One
Add/Update sales quotation	Full Authorization	*Sales Quotation* section in *Authorizations* window
Update sales employee in sales quotation or sales order	Full Authorization	*Change Sales Employee* and *Sales Employee Update* in *Sales - A/R* 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)	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.

> i Note
>
> 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.
>
> 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.

5.2 Mobile App Function Availability Based on SAP Business One License Type

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

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

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

5.3   Localization Specific Information

- Brazil - In companies who activated the multi-branch functionality the *Branch* field appears when viewing business partners and in sales orders and sales quotations.
- Chile - the *RUT* field is available in the business partner record
- Costa Rica, Guatemala, and Mexico - the *RFC* field is available in the business partner record
- India - the *P.A.N. No.* field is available in the business partner record
- Korea - the field *Business Place* is available in sales orders

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