Working with SAP Business One Sales Mobile App for Android

THE BEST RUN **SAP**

Content

1 Introduction

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

Key Features

- **Activities** - View, add, edit, close, and create follow-up activities of the user who is currently logged on to the mobile app.
- **Customers** - Access and manage customer information including addresses, phone numbers, and contact details; view historical activities and special prices; create new customers and new activities; and contact or locate partners.
- **Items** - Monitor inventory levels and access detailed information about your products, including sales price, available quantity, product specifications, and pictures.
- **Sales Documents** - Create, view, update, and search for sales quotations and sales orders. In addition, you can create, update, view, and close activities related to sales documents.
- **Sales Opportunities** - Create, view, and search for sales opportunities; view, add, and edit stages of sales opportunities.
- **Deliveries and Invoices** - View the list of deliveries and invoices with details such as the date, amount and customers, especially for those that are overdue.
- **KPI and Dashboards** - View predefined KPIs and dashboards (sales analysis and recommendations) in normal and full-screen mode.
- **Attachments** - View, download, and upload attachments (photos) to customers, items, activities, sales opportunities, and sales documents.

> **i Note**
>
> The SAP Business One Sales mobile app is relevant for the SAP Business One, version for SAP HANA application only.
>
> The SAP Business One Sales mobile app uses the Analytics Service in SAP Business One, version for SAP HANA in the back-end. Before mobile app users can use the analytical features and the *Customers* module in SAP Business One Sales, IT administrators must initialize the company databases on the SAP HANA database server and enable the analytics in the SAP Business One client application. For more information, see the Administrator's Guide and User Guide for SAP Business One analytics powered by SAP HANA.

2 Using SAP Business One Sales Mobile App

2.1 Getting Started

2.1.1 Installing SAP Business One Sales Mobile App

This topic shows you how to download and install SAP Business One Sales.

Procedure

1. In Google Play or Amazon Appstore, search for "SAP Business One Sales".
2. Download and install the SAP Business One Sales mobile app.

2.1.2 Logging In

This topic shows you how to set up and log in to SAP Business One Sales.

Procedure

1. Open the SAP Business One Sales mobile app.
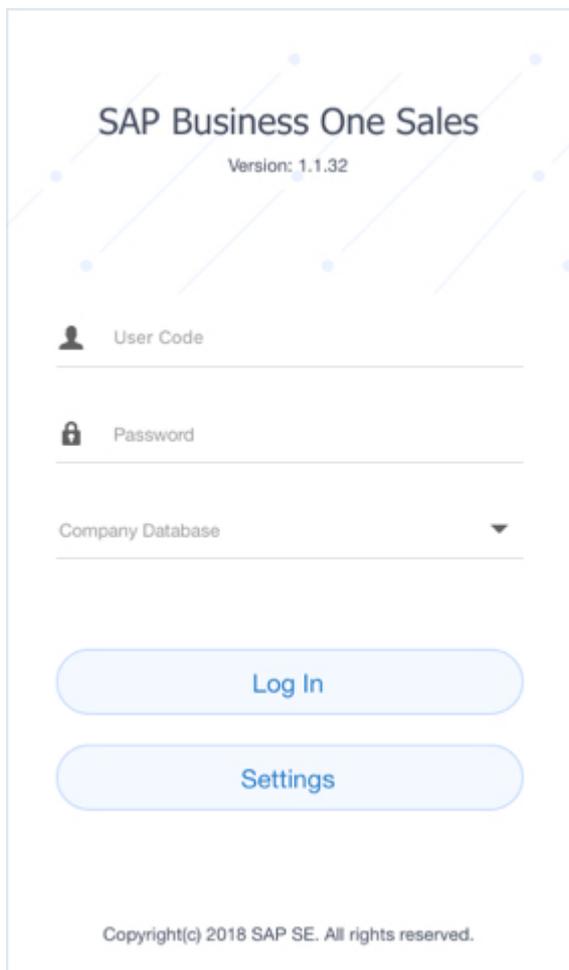
2. When logging in for the very first time, the *Settings* page pops up. You need to add your server address and port number, and then choose *Save*.

   If you do not know the server address, ask your IT administrator to look it up in the System Landscape Directory Control Center. If SAP Business One Sales is used with SAP Business One Cloud, you can also use the external server address which is mapped in the Cloud Control Center.

   Alternatively, you can switch on the *Demo System* button to work with a trial version.

3. Enter your user code or domain user code and your password, tap anywhere outside the text entry fields to hide the keyboard, select the database you would like to work with, and then choose *Log in*.

   If the login takes longer than 30 seconds, the action will time out.

Results

The home page of SAP Business One Sales appears.

You can use your user code and password to log in when you are offline. For security reasons, the maximum number of offline login attempts is five. If you exceed the maximum number, your account will be locked. You then need to log in to the app online.

2.1.3 Home Page

At the top of the home page screen, you can see the main modules of the SAP Business One Sales mobile app:

- *Activities*
- *Opportunities*
- *Quotations*
- *Sales Orders*
- *Business Partners*
- *Items*
- *Deliveries*
- *Invoices*
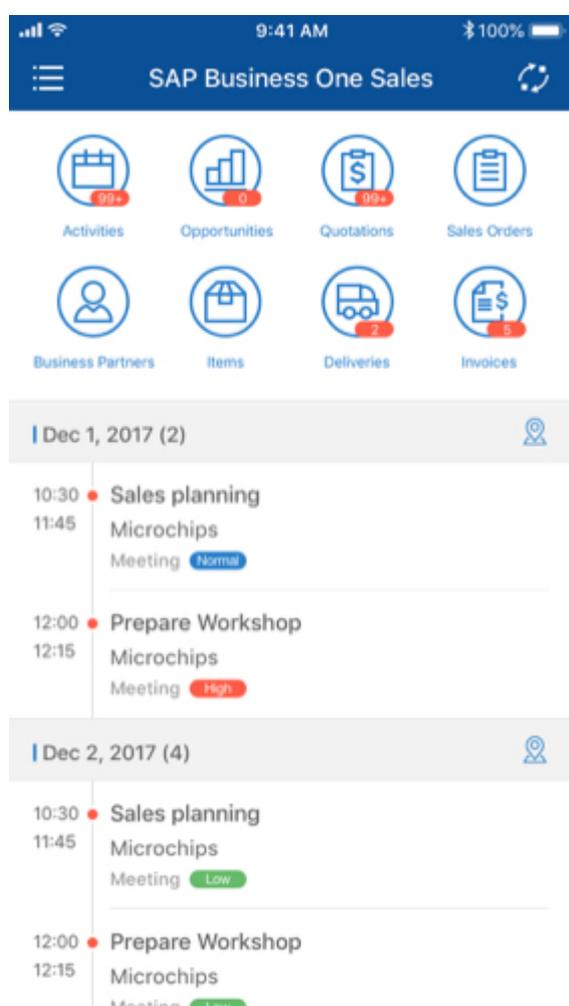
In the middle of the home page screen, you can view lists of recent active activities for today and the next four days.

The priorities of activities are indicated by different colors.

> ❖ Example
>
> Red indicates high priority, blue is for normal and green means low priority.

If you have a meeting type activity and the address of this meeting is valid, you can see a map icon at the right end of the date. Tapping this icon opens a map where you see all meeting type activities on this date and their address information, along with the customer names, remarks, and start date and time.

To synchronize your activities from SAP Business One Sales to the Calendar app that comes with your device, tap ▨. The activities in the last 15 days, today and the next 15 days (31 days in total) will be synchronized.

To download data, configure settings for your mobile app, or log out, tap ☰.

Related Information

2.1.4 Configuration Settings

Tap ☰ and choose *Settings* to access configuration settings. In the *Settings* window, you can:

- View the current user of the mobile app.
- View EULA - end user license agreement, accepted upon first logon. The details can be reviewed in this window.
- Choose *Clear Cache* to clear the cached data that has been accessed by the current user.

> **i Note**
>
> If the network is disconnected, you can still view the cached data. For example, you can view the sales document that was opened when you were online.
>
> The local data is stored in SQL Lite on the device disk and is encrypted.

- Choose *Layout Settings* to reorganize the layout of the displayed fields in the *Activities*, *Sales Opportunities*, *Sales Quotation*, *Sales Order* and *Item* modules.

  To change a field's position, tap the ≡ icon to select the field, and drag it to the proper position.
- Choose *UDF Settings* to display/hide the user-defined fields (UDFs) that were defined in SAP Business One in the *Activities*, *Sales Opportunities*, *Sales Quotation*, *Sales Order*, *Customer* and *Item* modules.

2.2 Managing Activities

In the *Activities* module you can:

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

- Close activities

2.2.1 Viewing and Editing Activities

Procedure

1. Tap the *Activities* module.

   The *Activities* page opens, displaying activities by date.

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

2. To view or edit the details of an activity, tap it to enter the *Activity* page.

   - To edit the activity details, tap *Edit*.
     To assign the activity to one or multiple users or user groups, tap *Handled By*.
     - To assign the activity to another user, choose your target user from the *Users* tab and tap *Done*.
     - To assign the activity to an existing user group, choose your target recipient list from the *Recipient List* tab and tap *Done*.
     - To assign the activity to multiple users from the *Users* tab, choose the users and tap *Done*, then enter a name to create a new recipient list for the selected users and tap *Yes*.
     - To assign the activity to multiple recipient lists from the *Recipient List* tab, choose the recipient lists and tap *Done*, then enter a name to create a new recipient list for the selected recipient lists and tap *Yes*.
     - To assign the activity to multiple recipients from the *Users* tab and the *Recipient List* tab, choose these recipients and tap *Done*, then enter a name to create a new recipient list for the selected recipients and tap *Yes*.

       > i Note
       >
       > If you assign an activity to another user or recipient list that excludes you, you won't see it in your activity list.

     Make other changes as necessary and tap *Save*.
     When you create a follow-up activity, the *Handled By* field will be copied.
   - To link the activity to a sales document, tap *Link To*.
   - To report the location of the activity, tap *Check In*.
     After a successful check-in, the address appears. You can view the address in a map.
     You can view the check-in addresses of the other users who handle the same activity with you, whether you have checked in or not.

     The checked-in activities can also be reviewed in the SAP Business One client (▌ *Business Partners* ❯ *Business Partner Reports* ❯ *Activity Check-In Report* ▐) by an authorized sales manager user. The report displays a check-in summary of the previous 7 days or 14 days.
   - To add a photo attachment, tap *Attachment*.

2.2.2 Creating a Follow-up Activity

Context

You can create a follow-up activity for an existing activity.

Procedure

1. Display the activity for which you want to create a follow-up activity.

2. Tap [...] and choose *Follow Up*. The *Activity* page appears in add mode, displaying all the details of the original activity. Make any required changes and tap the *Create* button to create a follow-up activity.
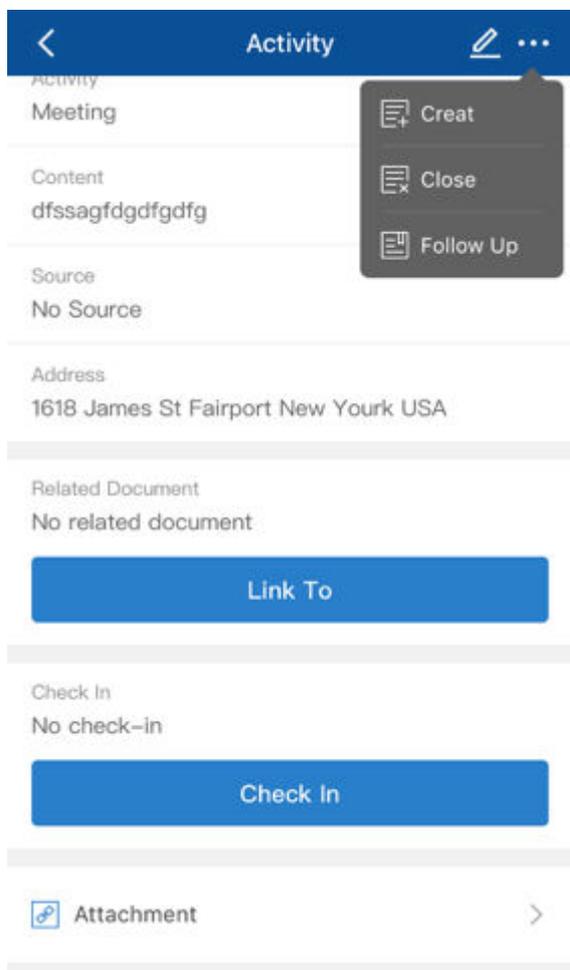
2.2.3 Creating a Sales Document Based on an Activity

Context

You can create a sales document based on an existing activity.

Procedure

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

    The sales document page appears in add mode.

Related Information

Creating a Sales Document [page 19]
Creating Sales Opportunities [page 27]

2.2.4 Closing Activities

Context

You can close an active activity.

Procedure

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

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

2.3   Managing Business Partners

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

2.3.1 Filtering and Sorting Customers

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

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

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

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

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

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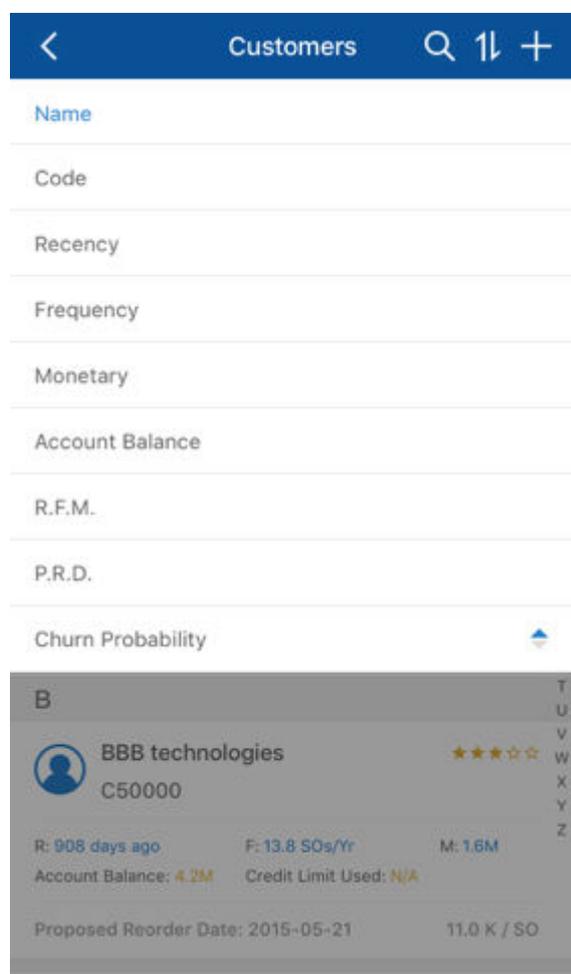
2.3.2 Viewing Customer Information

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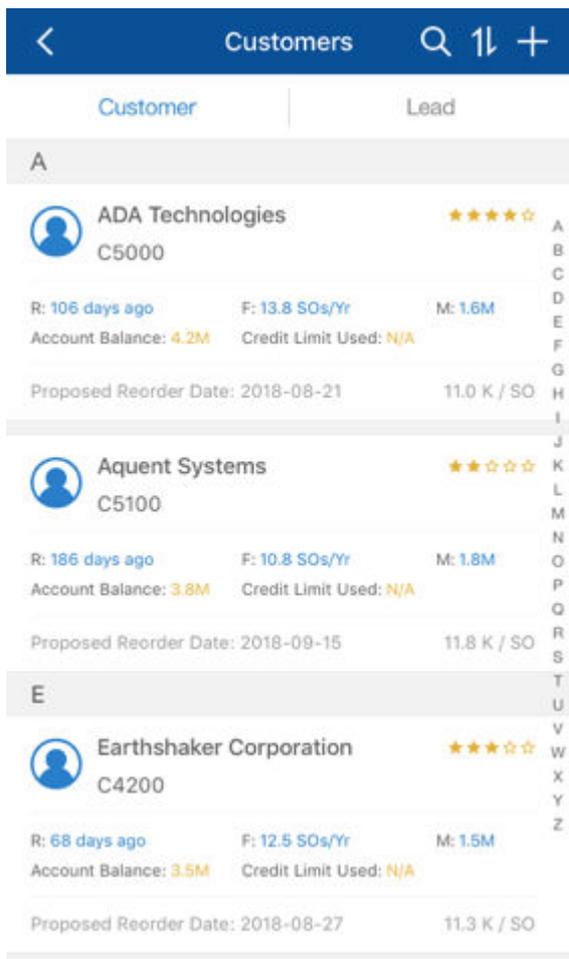
A list of customers appears, with each customer rated with 1-5 stars, 5 being the highest rating and 1 the lowest. The rating is calculated according to the recency, frequency of posting orders, and monetary values, consequently displaying your top customers.

○ *R: XXX days ago* (R stands for Recency)
Recency = Number of days since last sales order posting date. Customers will be displayed by days in ascending order.

○ *F: XXX SOs/Yr* (F stands for Frequency; SOs/Yr strands for Sales Orders/Year)
Frequency= Number of sales orders*365/Number of days in selected period (total life cycle days, first SO date to current day), rounded up to 0.1. Customers will be displayed by number in descending order.

○ *M: XXX* (M stands for Monetary)
Monetary means the total sales order amount of a customer that has accumulated since the first sales order. The unit of measure will be adjusted automatically. Customers will be displayed by monetary value in descending order.

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

> **i Note**
>
> To initiate the churn probability feature, and to update the churn statistics with the latest data in your company database in the future, IT administrators need to proceed as follows:

1. In a web browser, navigate to the following URL: `https://<Server Address>:<Port>/PredictiveAnalysis`
2. Log on to the company you are working with, and choose the *Refresh Now* button.
   On the web page, you can also find the history of previous refreshes.
   The supported Web browsers are Google Chrome, Microsoft Edge, Apple Safari, and Mozilla Firefox.

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

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

2. To view information about a customer, tap that specific customer.
   The *Customer* page appears. It includes the following tabs:
   - *General* – Displays the account balance, credit limit and payment terms of, and the price mode and price list for the customer, as well as contact details for the company, such as phone number, e-mail address, and Web site. User-defined fields are displayed under this tab in a separate section, grouped by the user-defined field categories.
     - *Price Mode* - Displays the pricing mechanism: Net (Net Price) and Gross (Gross Price).
       For more details, please see the guide How to Work with Gross Prices in SAP Business One 9.3.
   - *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 customer.
     - *Activities* – Displays the list of activities created for the customer.
       To view an activity, tap it.
       The *Activity* page appears. To edit the activity, tap the *Edit* icon, make changes, and tap *Save*.

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

       > **i Posting Instructions**
       >
       > The *Activity* page appears in add mode. Specify the information and tap *Create*.

     - *Sales Opportunities*, *Sales Quotations*, and *Sales Orders* – Display, respectively, the sales opportunities, sales quotations, and sales orders created for a customer. To create a new opportunity, sales quotation, or sales order, tap ✚. To return to the list of customers, on the top left of the screen, tap ◁.
     - *Special Prices* – Displays the special prices of items for the customer.
       To view items that have special price defined, tap *Special Prices*. The discount percentage and the special price are displayed. To view the item information, tap the item. From the item display, tap *Unit Price* to view the item's price in various price lists.

       > **i Note**
       >
       > Date-dependent special prices and quantity-based special prices are not supported.
       >
       > You can only view special prices for which you have the relevant authorizations.

- o *Deliveries* – Displays a list of overdue deliveries and a list of all the deliveries.
  By default, the list of overdue deliveries that are still open is displayed. You can see the total amount for each delivery with delivery number and customer on the due date. To see deliveries in other statuses, tap *All* and you can see a list of all the deliveries.
- o *Invoices* – Displays a list of overdue invoices and a list of all the invoices.
  By default, the list of overdue invoices that are still open is displayed. You can see the total amount for each invoice with invoice number and customer on the due date. To see invoices in other statuses, tap *All* and you can see a list of all the deliveries.
- o *Dashboard* - Displays the pervasive analysis dashboards' information for this customer.
  The predefined advanced dashboards contain the follow KPI and pervasive dashboard widgets:
  - o [Pervasive dashboard] - Sales Amount (with Tax) by Month
  - o [KPI] - Open Amount of Deliveries for Customer
  - o [KPI] - Customer Receivables
  - o [Pervasive dashboard] - Best-Selling Items by Sales Amount (with Tax)

  To customize the dashboards, IT administrators need to perform the following steps:

  1. In the SAP Business One, version for SAP HANA client, from the toolbar, choose .
     Alternatively, in the SAP Business One, version for SAP HANA client, from the menu bar, choose
     ▶ *Tools* ❯ *Pervasive Analytics* ❰ .
     Only users with authorizations for the pervasive analytics designer can access the window.
  2. Find the predefined advanced dashboard *Adv. Dashboard for SAP Business One Sales App - Customer* and edit it to meet your business needs.
     You can add new widgets, arrange the order of the widgets, or modify the widgets. But you cannot delete this predefined advanced dashboard. When you modify or add a new widget, make sure that the data is based on the specific customer you are exploring. Thus, in the data source of the KPIs and dashboards, you must include the `CardCode` dimension, and the name is case sensitive. Note that in a query-based data source, the result must have a column named *CardCode*.
     By default, the system displays the predefined dashboard. You customize it and define your own settings according to your business needs.
     To create a new dashboard, proceed as follow:
     1. Choose an existing dashboard that you have selected.
     2. Make your settings according to your business needs.
     3. Choose *Save as* to save the new dashboard.

     To use the new dashboard, proceed as follow:
     1. Go to the mobile service web page at `https://<Server Address of System Landscape Directory>:<Port Number>/ControlCenter/`.
     2. On the *Service* tab, choose *Mobile Service*.
     3. Log in to the system with your account.
     4. Under the *Sales App* tab, choose the predefined dashboard in the drill-down list of *BP Dashboard Template*.

     For more information, see *How to Work with Pervasive Analytics*.
  3. Save the advanced dashboard.

  4. In the SAP Business One Sales mobile app, from the *Dashboard* tab, tap .

2.3.3 Adding a Customer

Procedure

1. Tap *Customers*.
2. Tap ![plus icon].
3. Specify information for your customer.

> ❖ Example
>
> To specify a price mode, tap *Price Mode* and select *Net* or *Gross*. The default price mode is *Net*.
>
> After choosing a price mode, tap *Price List* to choose a price list with the selected price mode.
>
> Your choices will be applied when you create or duplicate a sales document and choose items for the customer.

4. Tap *Create*.

Related Information

2.3.4 Editing Customer Information

Procedure

1. Tap the *Customers* module.
2. Tap the customer that you want to edit.
3. Tap ![edit icon].
4. Make your changes.

> ❖ Example
>
> ○ To change the customer name, tap *Name*. Enter the new name in the text box.
> ○ To change the main contact for the customer, tap *Main Contact*.
>   The list of contacts defined for the customer appears:
>   ○ To add a contact, tap *Create a New Contact*, specify the information, and tap *Create*.
>   ○ To edit an existing contact, tap the contact, make the changes, and tap *Save*.

5. Tap *Save*.

Related Information

2.3.5 Clearing Customer Personal Data

Personal data about customers is stored in SQL Lite on the device disk and is encrypted. The data can be cleared manually and is cleared automatically by SAP Business One Sales in a specific scenario.

To manually clear all customer personal data that is stored on your mobile device, tap ☰ and choose ▶ *Settings* ⟩ *Clear Cache* ▶.

In addition, in order to help protect personal data for your customers, SAP Business One Sales is designed to automatically clear all data stored on your mobile device in the following scenario:

You have synchronized or cached some data and then been offline. → The system administrator changes any personal data for your customers from the SAP Business One client as requested by the customers. → You open the mobile app when you are back online.

In this scenario, you will receive one of the following messages:

- `To protect data privacy for your customers, all cached data, including the changes you have made offline, have been deleted. Please log in again to proceed. For more details or help, please contact your system administrator.`
- `To protect data privacy for your customers, all cached data, including the changes you have made offline, have been deleted. For more details or help, please contact your system administrator.`

You need to choose *OK*, and then log in again to retrieve the latest data.

2.4   Viewing Items in the Items Module

In the *Items* module, you can:

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

2.4.1 Viewing Information About Items

Procedure

1. Tap the *Items* module. The list of items is displayed, sorted alphabetically by item code.

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

    To refresh the list, pull down the list from the top of the list.
2. To view information about an item, tap the item.

    The *Item* page displays detailed information about the item, including user-defined fields.
    - To view the item picture, tap the placeholder picture.
    - To view the prices of the item, tap *Unit Price* to enter the *Price List* page.
      The *Net* tab displays price lists with the price mode *Net Price*; the *Gross* tab displays price lists with the price mode *Gross Price*.

      > **i** Note
      >
      > You can only view ces and price lists for which you have the relevant authorizations.

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

2.5 Managing Sales Documents (Sales Orders and Sales Quotations)

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

- *Sales Quotations* module
- *Sales Orders* module

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

2.5.1 Viewing Sales Document Information

1. To view a sales order or a sales quotation, tap the relevant module.
    A page appears listing the existing sales documents for the module you selected.
    By default, the sales documents are sorted in descending order by the posting date. To sort by document number or BP name, tap the ⬛ icon, and choose *Doc No.* or *BP Name*.
    To refresh the list, pull down the list at the top of the list.

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

2. To view information about a sales document in the list, tap the sales document.
   The *Info* page for the sales order and sales quotation contains four tabs: *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:

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

   o *Contents* tab
      For an item type document:
      Each row has a *Details* page, including item description, item code, quantity, unit of measure, items per unit, and user-defined fields, if any exist.
      To view row details, tap the row. The *Details* page appears.

   o *Logistics* tab – Bill-to and ship-to addresses and shipping type, if defined. To see a map and get directions, tap the relevant address.

   o *Accounting* tab – Payment terms and payment means defined for the document, as well as the BP project.

2.5.2 Filtering Sales Documents

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

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

- To view only documents with an Open status, choose *Open*.
- To clear the filter and display all documents, choose *All*.

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

2.5.3 Creating a Sales Document

Prerequisites

To trigger the approval procedure when adding or updating a sales document, IT administrators need to activate the approval procedure: from the SAP Business One client, choose ▌▶ *Main Menu* ❯ *Administration* ❯

System Initialization ❯ *General Settings* ❯ *BP* ❭ tab and then select the checkboxes *Activate Approval Procedures*, and *Activate Approval Procedures in DI*.

For more information about the setup, see the section Approval Process in the online help for SAP Business One.

Context

You can create a sales quotation or a sales order for items, but not for services.

Procedure

1. Tap the module of the sales document you want to create.

   The list of existing sales quotations or sales orders appears.

2. Tap ✚.

   The sales document page appears in add mode. Mandatory fields and mandatory user-defined fields are indicated by the ghost text *Required*.

3. The *Series* field displays the default numbering series defined for the sales quotation or sales order. To assign different numbering series to the document, tap this field. A list of all available numbering series appears. Tap the numbering series you want to assign to this document.

4. To specify the customer for whom the document is created, tap *customers*.

   A list of customers appears.
   1. Select the relevant customer. The main contact person and the default sales employee of the selected customer are automatically populated in the respective fields.
   2. To assign a different contact person or sales employee to the document, tap the relevant field. A list of the available contact persons or sales employees appears.
   3. In the *Logistics* section, the default *Ship To* and *Bill To* addresses appear.

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

   The *Items* page appears.
   1. Select the relevant items and tap *Done*.
      As of SAP Business One 9.3 PL10, you can use the barcode scanning function to quickly add an item.

      To do it, tap 🔳 in the top-right hand corner.

      > **i Note**
      >
      > You can select recommended items for this customer. The recommended items are calculated by the machine learning algorithm. If this customer has no sales records or recommended items in the database, the recommended items are the most frequently bought items company wide.
      >
      > Before mobile app users can use the recommendation feature, IT administrators need to make sure that the recommendation service runs successfully, by navigating to the URL: `https://<Server Address>:<Port>/PredictiveAnalysis` in a Web browser, logging on to the

company you are working with, and choosing the *Refresh Now* button. The supported Web browsers are: Google Chrome, Microsoft Edge, Apple Safari, and Mozilla Firefox.

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

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

4. To return to the sales document page, tap [<].

> **i Note**
>
> o If you want to change the *Price Mode* after choosing items, remove the items first.
> o If you select a price mode which is different from what is defined for the customer, you need to enter the *Gross Price* or *Unit Price* manually after you choose items.

6. Specify any other relevant information.
7. Tap *Create*.

    o If this sales document doesn't need approval by your supervisor or manager, you'll see it under the *Open* tab and *All* tab.
    o If this sales document needs approval by your supervisor or manager, an approval process will be triggered. In this case, proceed as follows:
        1. In the window *Approval Required –* `<Template Name>`, enter your remark (optional) and tap *OK*. `<Template Name>` is the name of an approval template used by your IT administrator to define fields in your sales document that need approval. If your sales document triggers multiple approval templates, you need to enter your remarks for each template and tap *OK*.
        2. Go to the *Approval Status* tab to trace and view the status of the document.

            o If the document is approved, open it and tap [→] to add it to your app.
            o If the document is rejected, you can make modifications and try again.

> **i Note**
>
> If you edit your sales document when it is pending approval or when it has been approved but not added to your app yet, note the following:
>
> o If you edit any fields in the document that need approval, a new approval process will be triggered.
> o If you edit the *Remarks* field and other fields (if any) in the document that don't need approval, you will see the window *Approval Required –* `<Template Name>` again; however, an actual approval process will not be triggered. Your changes in the document will be saved, but your remarks in the *Approval Required* window won't.

2.5.4 Updating a Sales Document

Prerequisites

You can update an existing sales quotation or sales order that complies with the following condition: the sales quotation or sales order is not partly or fully drawn into the target document.

Procedure

1. Open the sales quotation or sales order you need to update.
2. Tap in the top-right hand corner, and the document is switched to *Edit* mode.
3. Make your changes.
4. Tap *Save*.
   - If this sales document doesn't need approval by your supervisor or manager, you'll see it appear as a revision with a new document number under the *Open* tab and *All* tab.
   - If this sales document needs approval by your supervisor or manager, note the following:
     - If you have edited any fields in the sales document that need approval, a new approval process will be triggered. In this case, proceed as follows:
       1. In the window *Approval Required –* `<Template Name>`, enter your remark (optional) and tap *OK*.
          `<Template Name>` is the name of an approval template used by your IT administrator to define fields in your sales document that need approval. If your sales document triggers multiple approval templates, you need to enter your remarks for each template and tap *OK*.
       2. The sales document appears as a revision with a new document number under the *Open* tab, *All* tab and *Approval Status* tab. Trace and view the status of the document from any of these tabs.
          If your sales document is rejected, you can make modifications and try again.
     - If you have edited the *Remarks* field and other fields (if any) in the sales document that don't need approval, you will see the window *Approval Required –* `<Template Name>` again; however, an actual approval process will not be triggered.
       Tap *OK* in the *Approval Required* window. Your changes in the document will be saved, but your remarks in the *Approval Required* window won't.
       The sales document will appear as a revision with a new document number under the *Open* tab and *All* tab.

> **i Note**
> - The following information in a sales document cannot be modified:
>   - Customer code
>   - Customer name
>   - Currency
> - The following information in an **approved** sales document cannot be modified:
>   - Branch
>   - Discount%

> - ○ Total
> - ○ Payment terms

2.5.5 Managing Activities for Sales Documents

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

2.5.5.1 Viewing Activities Related to Sales Documents

Procedure

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

2.5.5.2 Adding New Activities to Sales Documents

Context

You can add a new activity to an existing sales quotation or sales order.

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

2.5.5.3   Editing Activities Related to Sales Documents

Context

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.
2. Display the activity you need to update and tap the *Edit* icon.
3. Make all required changes and tap *Save*.

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

Related Information

2.5.5.4   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.
2. Tap the activity you want to close. The *Activity* page appears.
3. Tap ⋯ and choose *Close*. A confirmation message appears.
4. To close the activity, approve the message.

Related Information

2.5.6 Submitting Sales Documents for Approval

Context

You can create or update sales quotations and sales orders and trigger an approval procedure, if defined.

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

Procedure

1. Create the sales quotation or sales order by following the steps provided in the Creating a Sales Document [page 19] section above.
2. To add the document, tap *Create*. A system message appears, notifying you that an approval is required.
3. Enter any relevant remarks and tap *OK*.

   The sales document is sent for approval.
4. To trace and view the status of the document that you sent for approval, choose the *Approval Status* tab.

   If the document is approved, you can add it to the application; if the document is rejected, you can make some modifications and try again.

2.5.7 Duplicating a Sales Document

Procedure

1. Open the sales document you want to duplicate and tap ⬛.
2. Tap *Duplicate*.

> **i Note**
>
> If you duplicate a sales document with the price mode of *Net and Gross*, both the price mode of the original document and the price modes of all items in it will be changed to the current price mode defined by your system administrator for the customer.

3. To change fields, see Creating a Sales Document [page 19].

2.5.8 Cancelling a Sales Document

Context

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

Procedure

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

2.5.9 Copying a Sales Quotation to a Sales Order

Context

You can further process sales quotations and copy them to sales orders.

Procedure

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

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

2.6   Managing Sales Opportunities

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

2.6.1 Viewing Sales Opportunities

Procedure

1. Tap the *Opportunities* module.

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

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

    > **i Note**
    >
    > By default, sale opportunities with an Open status are displayed. To display sales opportunities with a *Won* or *Lost* status, tap the required filter.
    >
    > When you initiate a search, the search applies to the filtered list only, and not to all of the existing sales opportunities.
    >
    > Sales opportunities with an Open status have an orange side dot in the front of the document.

2. To display all the sales opportunities in a pipeline mode, tap *Pipeline*. To switch back, tap *Opportunities*. The pipeline displays the stages of the opportunity.
3. Tap a sales opportunity to view its details.

Results

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

2.6.2 Creating Sales Opportunities

Procedure

1. Tap the *Opportunities* module.

    The list of existing sales opportunities appears.

2. Tap .

The *Sales Opportunity* page appears in add mode.

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

2.6.3 Viewing Stages Related to Sales Opportunities

Procedure

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

2.6.4 Editing Sales Opportunities

Context

You can edit the header information of a sales opportunity with an Open status or you can edit its last stage.

Procedure

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

2.6.5 Adding New Stages to Sales Opportunities

Context

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

Procedure

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

2.6.6 Setting Won or Lost Statuses to Sales Opportunities

Context

You can set the *Won* or *Lost* status to an existing sales opportunity with an Open status.

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 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.

2.7 Managing Deliveries

In the *Deliveries* module, you can get a quick overview of the delivery statues. You can get a list of the overdue deliveries that are still open. You can also get the detailed information for each delivery.

- **List View**
  View the list of the overdue deliveries and the list of all the deliveries
  By default, all the overdue deliveries are displayed. You can see the total amount, due date, delivery number and customer information. To view deliveries in other statues, choose *All* and you can get the list of all the deliveries.
- **Detail View**
  View the details for each delivery
  - View the *Header* tab, you can see the detailed information of the delivery document.
  - View the *Contents* information that specifies items or services to be sold.
  - View the *Logistics* data, such as the shipping and billing.
  - View the *Accounting* data, including the payment terms, payment method and BP project information.

  For more information, search for *Delivery* under *SAP Business One* on https://help.sap.com/viewer/product/SAP_BUSINESS_ONE_PRODUCT_LINE/Overview/en-US.

2.8 Managing Invoices

In the *Invoices* module, you can get a quick overview of the invoices. You can get a list of the overdue invoices that are still open. You can also get the detailed information for each invoice.

- **List View**
  View the list of the overdue invoices and the list of all the invoices
  By default, all the overdue invoices are displayed. You can see the total amount, due date, invoice number and customer information. To view invoices in other statues, choose *All* and you can get the list of all the invoices.
- **Detail View**
  View the details for each invoice
  - View the *Header* tab, you can see the detailed information of the delivery document, such as the applied amount, the balance due amount and total amount.
  - View the *Contents* information that specifies items or services to be sold.
  - View the *Logistics* data, such as the shipping and billing.
  - View the *Accounting* data, including the payment terms, payment method and BP project information.

  For more information, search for *A/R Invoice* under *SAP Business One* on https://help.sap.com/viewer/product/SAP_BUSINESS_ONE_PRODUCT_LINE/Overview/en-US.

2.9   Managing Attachments

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

2.9.1 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. Tap the attachment file you want to view.

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

2.9.2 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 attachments 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.
2. Tap *Attachments*. The *Attachments* page appears.
3. Tap ➕ .To choose an existing image file, tap *Choose Photo* and browse to the image file you want to attach. To take a picture and attach it, tap *Take Photo*.

4. In the Add Attachments page, enter the name of the photo.

2.10   KPI Screen

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

The predefined advanced dashboard appears by default on the KPI screen, which contains the follow KPI and pervasive dashboard widgets:

- [KPI] - Potential Amount of My Open Opportunities
- [KPI] - My Sales Amount (with Tax) for Current Month
- [Pervasive dashboard] - My Top 5 Customers by Sales Amount (with Tax)
- [Pervasive dashboard] - My Best-Selling Items by Sales Amount (with Tax)
- [Pervasive dashboard] -Potential Amt of My Open Opportunities by Stage
- [Pervasive dashboard] -My Sales Amount (with Tax)

When you choose any of the widgets on the KPI screen, you can drill down to view more information.

Customizing the KPI dashboard

If you are an IT administrator (professional user) and you want to customize the KPI dashboard, perform the following steps:

1. In the SAP Business One client, version for SAP HANA, from the toolbar, choose ⊡.
   Alternatively, in the SAP Business One client, version for SAP HANA, from the menu bar, choose ▶ *Tools* ❯ *Pervasive Analytics* ❯.

   > **i Note**
   >
   > Only users with authorizations for the pervasive analytics designer can access the window.

2. Find the predefined advanced dashboard **Adv. Dashboard for SAP Business One Sales App - Curr. Sales EE**.
   You can add new widgets, arrange the order of the widgets, or modify the widgets. But you cannot delete this predefined advanced dashboard. By default, the system displays the predefined dashboard. You can customize it and define your own settings according to your business needs.
   To create a new dashboard, proceed as follows:
   1. Choose an existing dashboard that you have selected.
   2. Make your settings according to your business needs.
   3. Choose *Save as* to save the new dashboard.
   To use the new dashboard, proceed as follows:
   1. Go to the mobile service web page at `https://<Server Address of System Landscape Directory>:<Port Number>/ControlCenter/`.
   2. On the *Service* tab, choose *Mobile Service*.
   3. Log in to the system with your account.

4. Under the *Sales App* tab, choose the predefined dashboard in the drill-down list of *KPI Template*. For more information, see *How to Work with Pervasive Analytics*.

3. Ask the SAP Business One Sales mobile app users to choose from the *KPI* tab.

3 Configuring SAP Business One Solutions for SAP Business One Sales Mobile App

3.1 Hardware and Software Requirements

This topic describes the hardware and software requirements for mobile devices and the requirements for SAP Business One solutions.
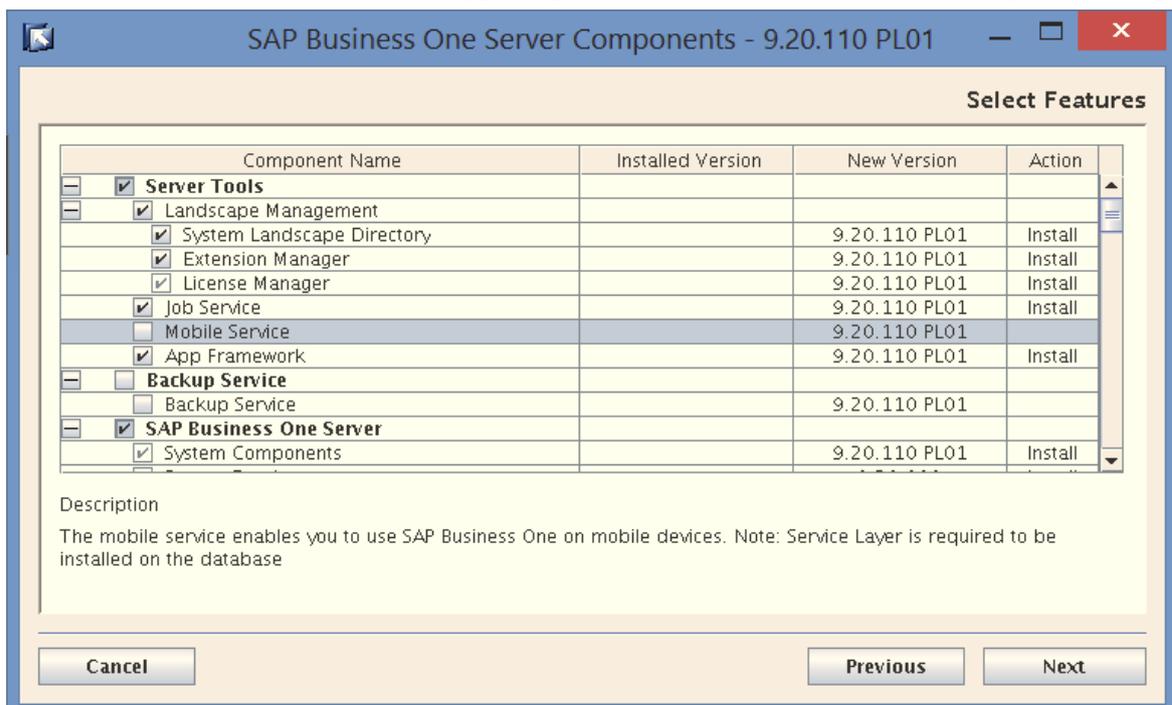
Requirements for Mobile Devices

SAP Business One Sales requires:

- Android phones and tablets
- Android 5.1 and above

Requirements for SAP Business One

1. You have installed SAP Business One 9.2 patch level (PL) 04, version for SAP HANA or higher.
2. In the server components installation or upgrade, you have selected the *Mobile Service* component.

If the mobile app is used externally, you need to configure access from the mobile device to the Mobile Service, System Landscape Directory and Analytics Platform. For reference, see the sections *Prepare Certificates* and *Configure Nginx Reverse Proxy* in the guide How to Deploy SAP Business One with Browser Access.

> **i Note**
>
> The SAP Business One Sales mobile app must be used with SAP Business One, version for SAP HANA. You need to deploy the Service Layer, Analytical Features and App Framework components in order for this mobile app to work successfully.
>
> 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.

Requirements for SAP Business One Cloud

> **i Note**
>
> As of version 1.1.10 or higher, the SAP Business One Sales mobile app is compatible with SAP Business One Cloud.

- You have installed SAP Business One Cloud 1.1 patch level (PL) 07 or higher.
- You have installed SAP Business One 9.2 patch level (PL) 05, version for SAP HANA or higher.
- In the server components installation or upgrade, you have selected the *Mobile Service* component.
  After successfully installing the *Mobile Service*, in the Cloud Control Center, you can view the services from
    Landscape Management > *Mobile Services* .
- If the mobile app is used externally, you need to register the mappings between the external addresses and the internal addresses of the Mobile Service, System Landscape Directory and Analytics Platform in the Cloud Control Center.
  For more information about the *Cloud Control Center* and *mapping internal and external URLs*, see the Administrator's Guide for SAP Business One Cloud.

> **i Note**
>
> In the on-demand environment, domain users that are set up as Cloud Operators in the Cloud Control Center will be able to see all companies (including those to which the users don't belong) when logging into the following:
>
> - SAP Business One Sales mobile app
> - SAP Business One Service mobile app
> - Cloud Control Center for SAP Business One
>
> However, this will not happen in the SAP Business One client because of filtering functionality.

Security Certificates

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

We recommend that you use a purchased certificate (for example, PKCS12 certificate).
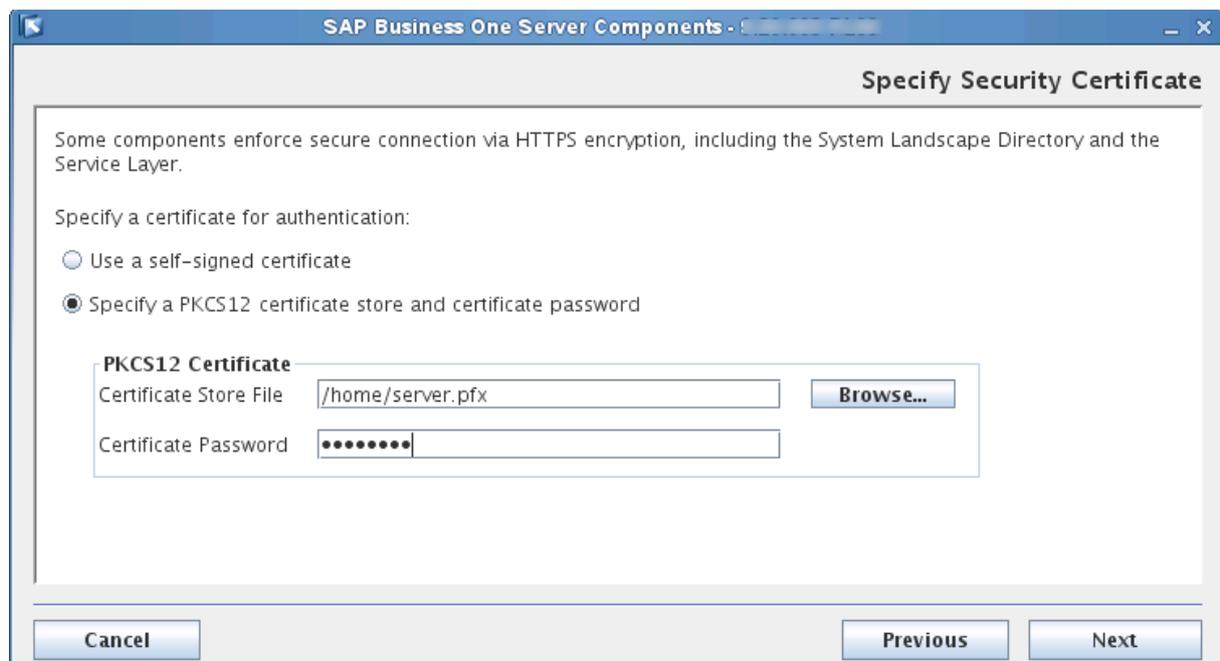
If you choose the *Use a self-signed certificate* option, be sure to use the hostname rather than the IP address when specifying the server. The host name must be the Linux server hostname, which can be accessed by the mobile devices.
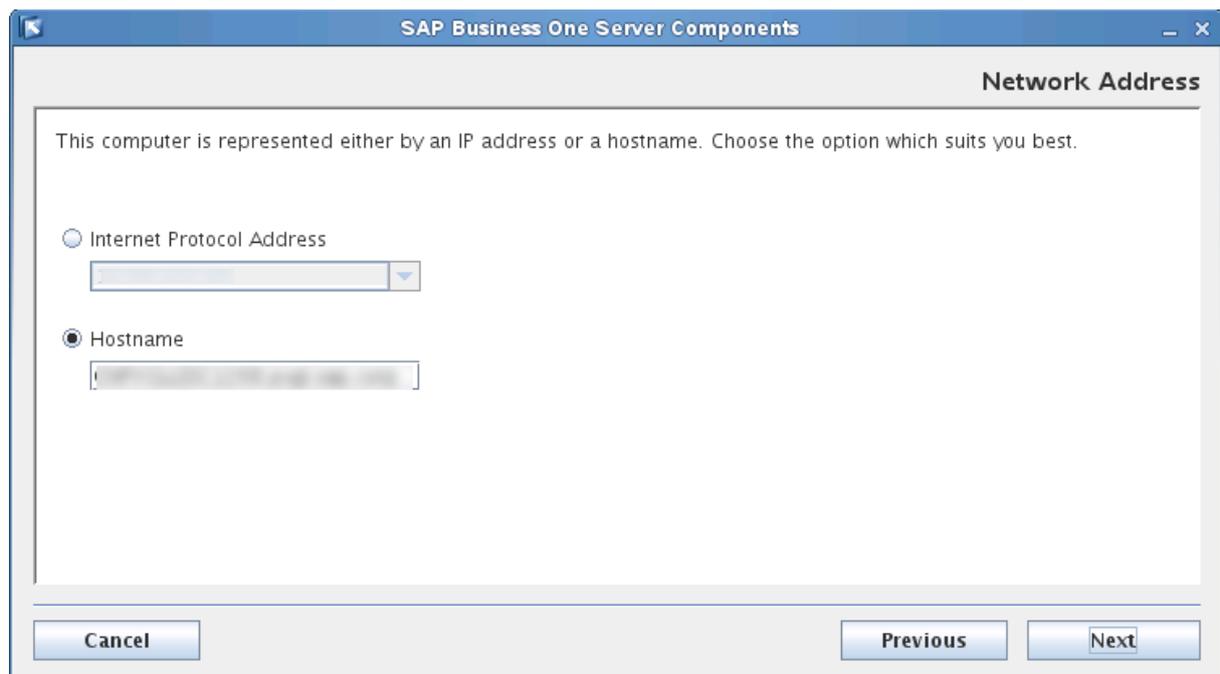
3.2 Required Licenses

The license required to use SAP Business One Sales.

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

- Professional User
- Limited CRM User
- Starter Package User
- Mobile Sales User

3.3 Creating Accounts and Setting Authorizations for Mobile App Users

After you get a required license, you need to create user accounts and set authorizations for SAP Business One Sales mobile app users in the SAP Business One client.

Procedure

1. From the SAP Business One *Main Menu*, choose ▐▶ *Administration* ❯ *Setup* ❯ *General* ❯ *Users* ◗ to create a new user account.

   > **i Note**
   >
   > **Deselect** both *Superuser* and *Mobile User*.

2. Import the license file and assign the license type to this new user.
3. Create a new user group and set authorizations for mobile app users:

   a. From the SAP Business One *Main Menu*, choose ▐▶ *Administration* ❯ *Setup* ❯ *General* ❯ *User Groups* ❯ *Create Group* ◗.

   b. Choose ▐▶ *Administration* ❯ *System Initialization* ❯ *Authorizations* ❯ *General Authorizations* ◗ to open the *Authorizations* window.

      On the *Groups* tab, select the default *Sales* group choose *Copy Authorizations*.

      Select the user group that you created and choose ▐▶ *OK* ❯ *Yes* ◗.

   c. On the *Groups* tab, select the created user group and set authorizations.

      > **→ Recommendation**
      >
      > It is highly recommended that you first set specific authorizations for the subjects listed in the table below. Then you can set authorizations by your business needs.

Subject Level 1	Subject Level 2	Subject Level 3	Subject Level 4	Subject	Default Authorization	Recommended Authorization
Administration	System Initialization	Document Numbering		Document Numbering	No Authorization	Read Only
Administration	Setup	General	Users	Users	No Authorization	Read Only
Administration	Setup	General	Sales Employees/Buyers	Sales Employees/Buyers	No Authorization	Read Only
Administration	Setup	Financials	Currencies	Currencies	No Authorization	Read Only
Administration	Setup	Financials	Projects	Projects	No Authorization	Read Only
Administration	Setup	Financials	Tax	Sales Tax Codes	No Authorization	Read Only
Administration	Setup	Opportunities	Opportunity Stages	Opportunity Stages	No Authorization	Read Only
Administration	Setup	Business Partners	Countries	Countries	No Authorization	Read Only
Administration	Setup	Business Partners	Customer Groups	Customer Groups	No Authorization	Read Only
Administration	Setup	Inventory	Warehouses	Warehouses	No Authorization	Read Only
Administration	Setup	Inventory	Units of Measure	Units of Measure	No Authorization	Read Only
Administration	Setup	Inventory	Shipping Types	Shipping Types	No Authorization	Read Only
Opportunities				Opportunities	No Authorization	Full Authorization
Opportunities	Opportunity			Opportunity	No Authorization	Full Authorization
Opportunities	Special Opportunity Authorizations			Special Opportunity Authorizations	No Authorization	Full Authorization
Human Resources	Employee Master Data			Employee Master Data	No Authorization	Read Only
Analytics	Content	KPI	Churn Probability	Churn Probability	No Authorization	Full Authorization
Analytics	Content	Advanced Dashboard	Adv. Dashboard for SAP Business One Sales App - Curr. Sales EE	Adv. Dashboard for SAP Business One Sales App - Curr. Sales EE	No Authorization	Full Authorization

Subject Level 1	Subject Level 2	Subject Level 3	Subject Level 4	Subject	Default Authorization	Recommended Authorization
Analytics	Content	Advanced Dashboard	Adv. Dashboard for SAP Business One Sales App - Customer	Adv. Dashboard for SAP Business One Sales App - Customer	No Authorization	Full Authorization

4. Assign the new user to the new user group.

   a. Find the new user in the *Users - Setup* window.

   b. Choose the ellipsis button (...) next to the *Groups* field and select the new user group.

   c. Choose ▶ *Update* ❯ *OK* ❯.

   If you are running SAP Business One 9.3 Patch Level 05 or earlier, version for SAP HANA, proceed as follows:

   1. In the *Users* tab of the ▶ *Administration* ❯ *System Initialization* ❯ *Authorizations* ❯ *General Authorizations* ❯ *Authorizations* ❯ window, select the new user.

   2. Assign *Full Authorization* to the *Customers* and *Leads* fields under ▶ *Business Partners* ❯ *Business Partner Type* ❯.

5. Restart the Service Layer.

> → Recommendation
>
> We recommend that you change the initial password for the mobile app user before the user uses SAP Business One Sales.
>
> To change the password, from the SAP Business One client, choose ▶ *Administration* ❯ *Setup* ❯ *General* ❯ *Security* ❯ *Change Password* ❯.
>
> If you use the mobile app only, without the SAP Business One client (for example, you have a mobile sales license), you will not be able to change your password from the mobile app.

For more information about how to perform the above steps, see the online help for SAP Business One, version for SAP HANA.

Results

A mobile user account is created. You need to provide the mobile app user with the user code and password.

3.4 Deploying Certificates

This topic describes how to deploy a certificate to your mobile device.

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 through HTTPS encryption. You need to ensure that your mobile device is also secured by the certificates.

- Purchased certificate (Recommend):
  We recommend that you use a purchased certificate (for example, PKCS12 certificate).
  To import certificate to SAP Business One, version for SAP HANA, follow instructions on the *Certificate* part of chapter *SAP Business One, version for SAP HANA* in SAP Note 2046101 .
  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 (SAP Business One default certificate):
  If you use a self-signed certificate, you must first export the certificates that you used for System Landscape Directory, Mobile Service, and Analytics Platform, and then import them to your mobile device.
- Self-signed certificate (Self-generated certificate):
  If you want to re-generate self-signed certificate for your server, refer to SAP Note 2298985 .
  If you are using external address mapping for mobile service, refer to *Prepare Certificate* and *Configure Nginx Reverse Proxy* sections in the guide *How to Deploy SAP Business One (Cloud) with Browser Access*.

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

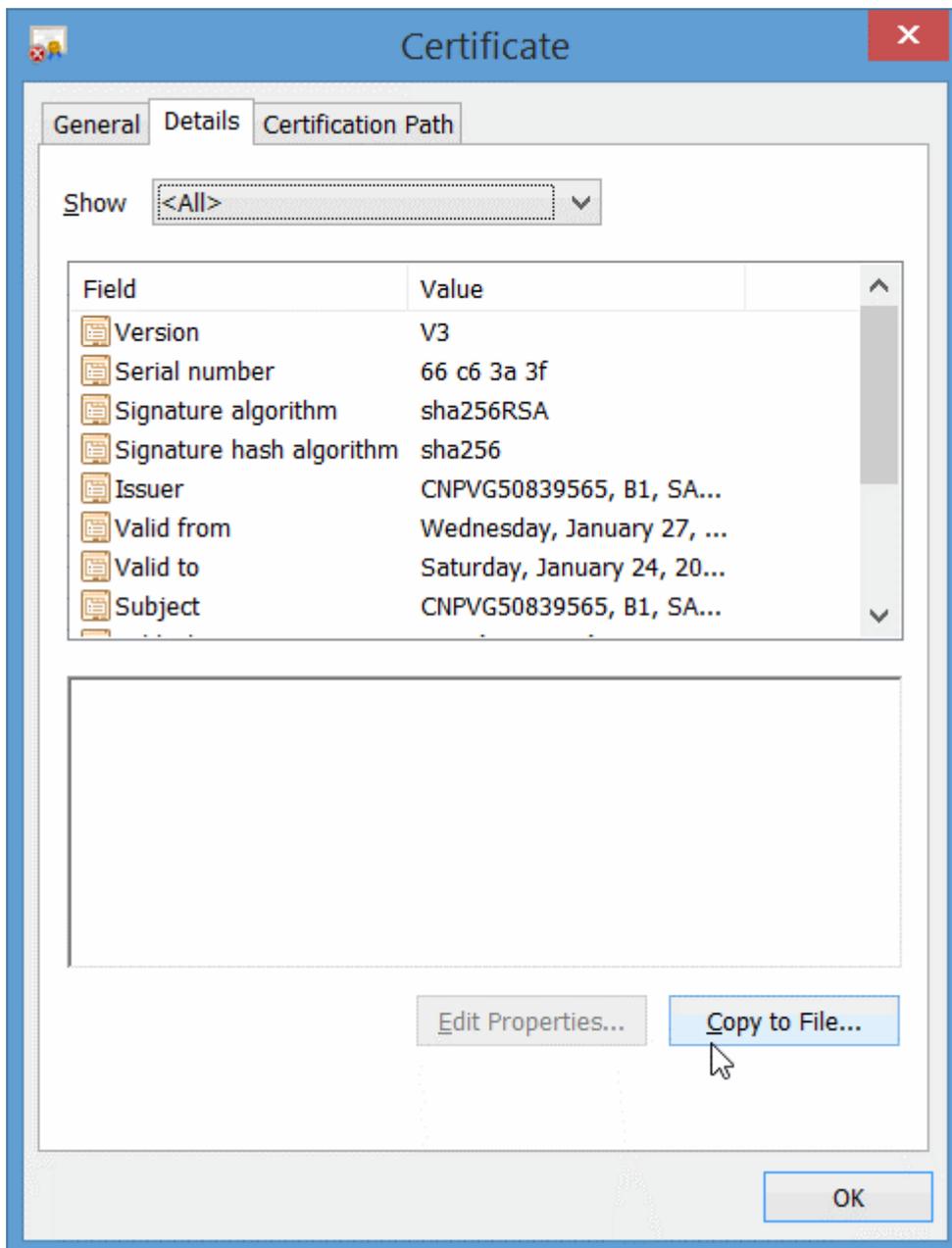To **export a certificate**, perform the following steps:

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

3. Click *View certificates*.
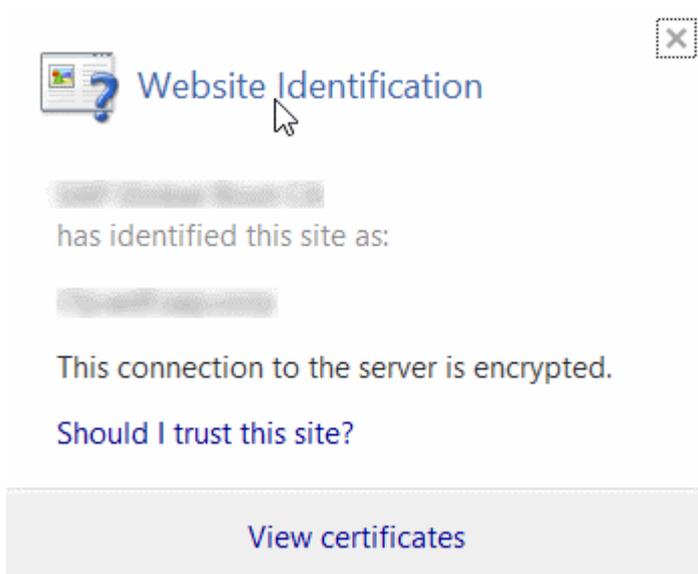
4. In the *Certificate* window, on the *Details* tab, choose *Copy to File*.

5. In the *Certificate Export Wizard* window, choose *Next*.

6. Select the *DER encoded binary X.509 (.CER)* format, and choose *Next*.

7. Enter a name for the file and the location (including the entire path), or click *Browse*, navigate to the location, and then enter the file name.

8. Click *Finish*.

To **import a certificate** to your mobile device, perform the following steps:

1. Copy the certificate file to your mobile device.

2. Install the certificate to your mobile device.

3.5 Configuring User Authentification

This topic shows you how to configure a type of authentification as a login method for the SAP Business One Sales mobile app users.

Context

In an on-premise environment, you have the following authentification options:

- Single Sign On (Logging in with Windows domain user accounts).
- Logging in with SAP Business One user accounts.

In an on-demand environment, only Single Sign On is supported.

Procedure

To configure a type of user authentification for SAP Business One Sales, proceed as follows:

1. Log in to the System Landscape Directory.
2. Go to *Security & Logging*.

   - If you want the mobile app users to log in to SAP Business One Sales with Windows domain user accounts, select both *Enable Single Sign On (Log In Using Windows Domain Account)* and *Disable Logins with SAP Business One User Accounts*.
   - If you want the mobile app users to log in to SAP Business One Sales with SAP Business One user accounts, deselect both *Enable Single Sign On (Log in Using Windows Domain Account)* and *Disable Logins with SAP Business One User Accounts*.

> **i** Note
>
> In the on-premise environment, you can't enable both of the authentification options. Even if you select *Enable Single Sign On (Log In Using Windows Domain Account)* and deselect *Disable Logins with SAP Business One User Accounts*, only Single Sign On will take effect.

3.6 Setting Up Attachment Folder

In the On-Premise Environment

You can set up a shared folder for attachments in either one of the following ways:

Method 1

1. From the Windows server:
    1. Create a shared folder with read and write permission.
    2. In the SAP Business One client, choose ▶ *Administration* ❯ *System Initialization* ❯ *General Settings* ❯ *Path* ❩ . In the *Attachments Folder* field, enter the shared folder. Make sure that the folder path is a network path rather than a local path. For example, `\\10.59.38.19\Attachments`.
2. From the Linux server where the Mobile Service is installed:
    1. Create a folder (for example, `/mnt/Attachments`).
    2. Mount the Linux folder to the Windows folder by running the following command:
       ```
       mount -t cifs -o
       domain=xxxxx,username=xxxxx,password=******,file_mode=0777,dir_mode=0777 "//
       10.59.38.19/Attachments/" /mnt/Attachments
       ```

       > i Note
       >
       > Please be noted that the path is case-sensitive.

    3. Replace `username` and `password` with the username and password of the Windows server.

Method 2

Alternatively, you can use the system configuration file `/etc/fstab` to automatically mount the Linux folder to the Windows shared folder once the Linux server reboots. To do this, perform the following steps:

1. Log in as a root user to the Linux server where you install the Mobile Service, and create a credential file (for example, `/etc/mycifspass`) with the following content:
   ```
   domainname=xxxxx
   username=xxxxx
   password=******
   file_mode=0777
   dir_mode=0777
   ```
2. Open the system configuration file `/etc/fstab` and append one line as below:
   ```
   //10.59.38.19/Attachments/ /mnt/Attachments cifs credentials=/etc/mycifspass 0 0
   ```

   > i Note
   >
   > Please be noted that the path is case-sensitive.

3. Reboot the Linux server and you will find the Windows shared folder automatically mounted.

44   PUBLIC

Working with SAP Business One Sales Mobile App for Android
Configuring SAP Business One Solutions for SAP Business One Sales Mobile App

In the On-Demand Environment

1. In the Cloud Control Center for SAP Business One, choose ▶ *Landscape Management* ❯ *Service Units* ❳.
2. Choose the appropriate service unit, and on the *Storage* tab, copy the path defined as a shared folder for the corresponding service unit (for example: `\\server_hostname\SharedFolder\SU-XYZ`).
3. Paste the path to a text editor and replace the backslash (\) with a forward slash (/). The folder path is then as follows: `//server_hostname/SharedFolder/SU-XYZ`.

   > **i** Note
   >
   > As the application is case-sensitive, we recommend that you copy and paste the path rather than type it manually.

4. Create an empty folder on the Linux server on which the Job Service is installed, for example: /mnt/attachment.
   Give permission to this folder with the command: `chmod 777 -R /mnt/attachment`.
5. Mount the folder path from Step 3 to the empty folder created in Step 4 (please copy the path) with the following command:
   ```
   mount -t cifs -o domain=<domain
   name>,username=sapserviceb1c,pass=**password**,sec=<security
   mode>,uid=<sid>adm,forceuid '//server_hostname/SharedFolder/SU-XYZ' /mnt/
   attachment
   ```
   Alternatively, open the `/etc/fstab` file and add the following text to automate the process of mounting partitions:

   ```
   //server_hostname/SharedFolder/SU-XYZ /mnt/attachment cifs credentials=/
   root/.cifs,domain=<domain name>,uid=<sid>adm,forceuid,sec=<security mode> 0 0
   /root/.cifs:
   username=sapserviceb1c
   password=**password**
   ```

   The default security mode in mainline kernel versions prior to v3.8 is sec=ntlm. In v3.8, the default security mode is changed to sec=ntlmssp.
   To view a complete list of all parameters, please refer to the mount.cifs(8) manual page (for example, man mount.cifs).
6. After mounting the folder, use the `cp` command to test if the files in the folder are readable.

3.7 Configuring for SAP Crystal Reports

Context

Crystal reports in SAP Business One 9.3 PL04, version for SAP HANA or later versions can be displayed in the SAP Business One Sales mobile app.

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.

   > ℹ Note
   >
   > 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.

5. From the home page of the SAP Business One Sales mobile app, you can view the available Crystal report list. Enter variables to generate Crystal reports on your device.

3.8 Setting Up Add-Ons to Run Within SAP Business One Sales Mobile App

Context

As of SAP Business One 9.2 PL08, version for SAP HANA, you can set up your own Web applications within the SAP Business One Sales mobile app.

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

> ℹ Note
>
> Setting up add-ons for SAP Business One Sales is supported in the **on-premise** environment only.

Procedure

1. From the SAP Business One *Main Menu*, choose ▶ *Administration* ❯ *Add-Ons* ❯ *Mobile Add-On* ◀.
2. In the *Mobile Add-On - Setup* window, select whether the add-on is for the SAP Business One Sales mobile app, or the SAP Business One mobile app, or both.

3. For the SAP Business One Sales mobile app, enter the relevant data for the add-on in the *Code*, *Name*, *Entry URL*, and *Provider* fields.

> **i Note**
>
> The *Type*, *View Style*, and *Logon Method* fields are for the SAP Business One mobile app only. They are not relevant for the SAP Business One Sales mobile app.

4. Select the *Enable* checkbox.
5. To save your settings, choose *Update*.
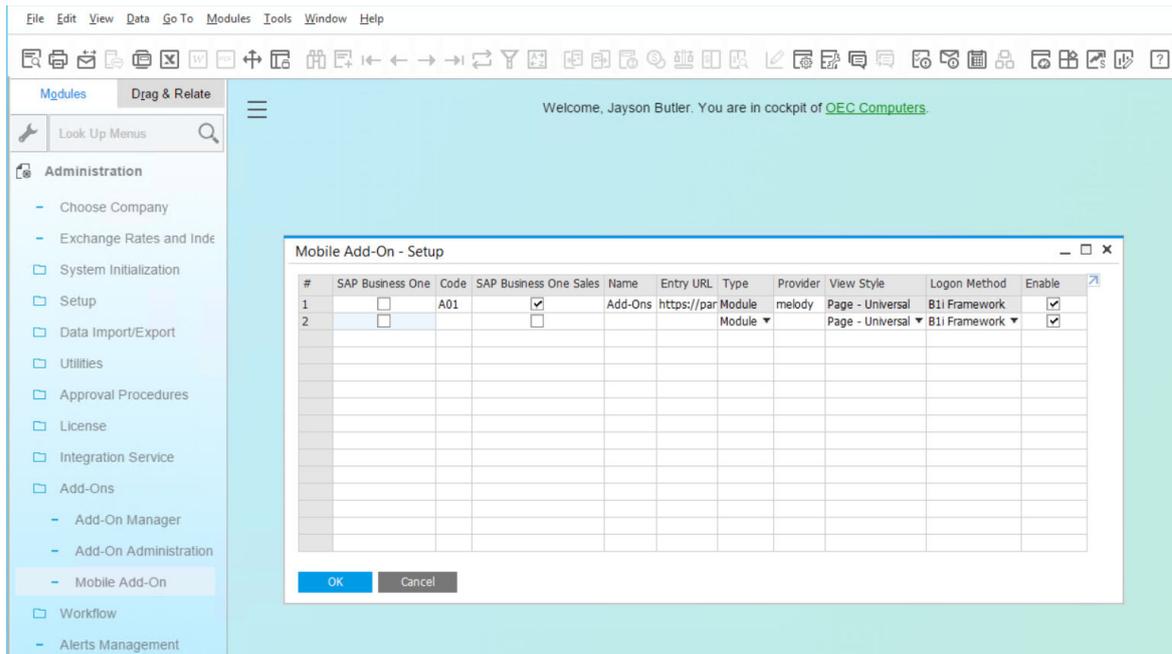
Next Steps

After you set up an add-on from SAP Business One, the add-on can be accessed from the SAP Business One Sales mobile app main menu.

Tap the ▤ icon in the top left hand corner of the home page; you can see the add-on appears at the bottom of the functions list.

> **i Note**
>
> Single sign on (SSO) is supported. If you have registered this add-on to the System Landscape Directory (SLD) of SAP Business One, you can open the add-on directly without entering credentials.

3.8.1 Communicating with SAP Business One Sales Mobile App from Your Add-Ons

The SAP Business One Sales mobile app allows add-ons to communicate with predefined scheme URLs so that an add-on can access existing functions seamlessly.

Available Functions

The URLs for customer master data and item master data are available for you. If you use them in your own web application, the user can directly open customer master data or item master data in SAP Business One Sales.

Function Type	URL	Description
Business Partner	`sapb1://call?cmd=OCRD&key=[BP Code]`	Open details of a business partner
Inventory Item	`sapb1://call?cmd=OITM&key=[Item Code]`	Open details of an inventory item

Samples

- Open a customer master data (BP code is C20000)
  `sapb1://call?cmd=OCRD&key=C20000`
- Open an item master data (Item code is I00003)
  `sapb1://call?cmd=OITM&key=I00003`

Working with SAP Business One Sales Mobile App for Android
Configuring SAP Business One Solutions for SAP Business One Sales Mobile App

PUBLIC   **49**

Document History

Version	Date	Change
1.0	2016-06-06	Initial version
1.1	2016-09-09	Layout settings
		Special price of items for business partners
		Map with location displayed for meeting type activities
		Recommended items in creating/editing Sales Quotation and Sales Order
1.2	2016-11-07	Compatible with SAP Business One Cloud
		Sales document approval procedure
1.3	2017-02-20	Logon page: choose company database
		Added cache mechanism
		Display Crystal reports
1.4	2017-05-18	UDF configuration settings
1.5	2018-09-28	Support activity assignment and Price Mode
1.6	2019-09-09	Logon page: company name is displayed when you choose it from a list.
		Home page: *Delivery* and *Invoice* have now replaced *SAP Crystal Reports* and *KPI*.You can still use them in the menu.
		KPI and BP dashboard configuration settings are updated.
		More fields are available in *Activity* and in *BP* detail pages.

Important Disclaimers and Legal Information

Hyperlinks

Some links are classified by an icon and/or a mouseover text. These links provide additional information.
About the icons:

- Links with the icon 	 : You are entering a Web site that is not hosted by SAP. By using such links, you agree (unless expressly stated otherwise in your agreements with SAP) to this:

    - The content of the linked-to site is not SAP documentation. You may not infer any product claims against SAP based on this information.
    - SAP does not agree or disagree with the content on the linked-to site, nor does SAP warrant the availability and correctness. SAP shall not be liable for any damages caused by the use of such content unless damages have been caused by SAP's gross negligence or willful misconduct.

- Links with the icon 	 : You are leaving the documentation for that particular SAP product or service and are entering a SAP-hosted Web site. By using such links, you agree that (unless expressly stated otherwise in your agreements with SAP) you may not infer any product claims against SAP based on this information.

Videos Hosted on External Platforms

Some videos may point to third-party video hosting platforms. SAP cannot guarantee the future availability of videos stored on these platforms. Furthermore, any advertisements or other content hosted on these platforms (for example, suggested videos or by navigating to other videos hosted on the same site), are not within the control or responsibility of SAP.

Beta and Other Experimental Features

Experimental features are not part of the officially delivered scope that SAP guarantees for future releases. This means that experimental features may be changed by SAP at any time for any reason without notice. Experimental features are not for productive use. You may not demonstrate, test, examine, evaluate or otherwise use the experimental features in a live operating environment or with data that has not been sufficiently backed up.
The purpose of experimental features is to get feedback early on, allowing customers and partners to influence the future product accordingly. By providing your feedback (e.g. in the SAP Community), you accept that intellectual property rights of the contributions or derivative works shall remain the exclusive property of SAP.

Example Code

Any software coding and/or code snippets are examples. They are not for productive use. The example code is only intended to better explain and visualize the syntax and phrasing rules. SAP does not warrant the correctness and completeness of the example code. SAP shall not be liable for errors or damages caused by the use of example code unless damages have been caused by SAP's gross negligence or willful misconduct.

Gender-Related Language

We try not to use gender-specific word forms and formulations. As appropriate for context and readability, SAP may use masculine word forms to refer to all genders.

THE BEST RUN SAP