



# SAP Business One Sales Mobile App

Sell smarter with the Sales mobile app for iOS or Android

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# Introduction

SAP Business One Sales lets you handle your sales activities anywhere, anytime and via any mobile device. Sales employees can access to the most relevant business information and processes to help them manage customers and sales opportunities, fast and effectively.



Drive Sales team productivity



User-friendly and simple to use



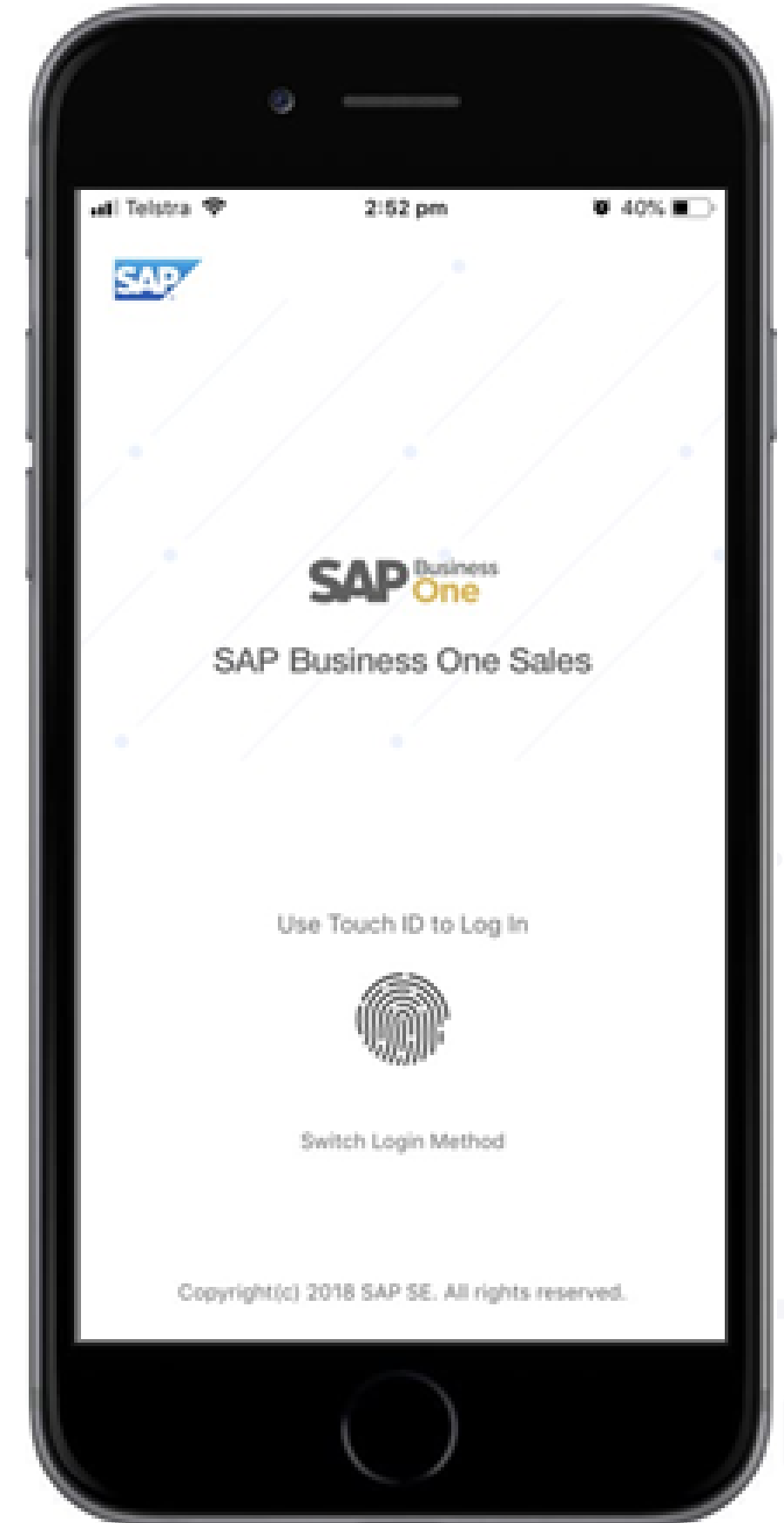
Respond directly and trigger processes



Access data in real time



Automatic updates on SAP



# Lose the laptop. Set the Sales team free.

To win in the digital economy, sales professionals need to maximize every customer engagement with instant access to the most relevant business information, wherever they are.

## View KPIs and sales reports

- Top 5 customers
- Top 5 best-selling items
- Orders and pipeline value

## Manage sales opportunities

- Create new sales opportunities
- Update lead status
- View sales leads by industry or activity days

## Manage customer accounts

- Create a new customer account
- Sort customers by order value, frequency, or account balance
- Attach documents or special pricing to an account

## Manage day-to-day activity

- View appointments and activities in a calendar
- Set up document folders and link related documents
- Check-in, remote worker safety feature

## Stock levels




- Search and view stock inventory
- View unit price and quantity
- View quantity of an item by warehouse location

## Manage orders




- Search for, create and cancel sales orders
- Update an existing sales order or quote
- Sort related documents by number, name or delivery date

# Technical information

## Requirements for iOS

-  SAP Business One 9.2 PL10, version for SAP HANA, or higher
-  Apple iPhone 5 or newer, iOS 8.0 or higher
-  Download from Apple App Store

## Requirements for Android

-  SAP Business One 9.2 PL10, version for SAP HANA, or higher
-  Android 7.0
-  Download from Google Play Store

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**Supports:** Service Layer, SAP Business One Analytics, and App Framework

**License:** Professional, Limited CRM, Starter Package, and Mobile Sales users (new)

**Security:** Basic access authentication at logon, license-based function-level and user-based data-level authorization (data ownership), valid SSL certificates enforced, Apple TouchID

**Languages:** All 27 languages of SAP Business One

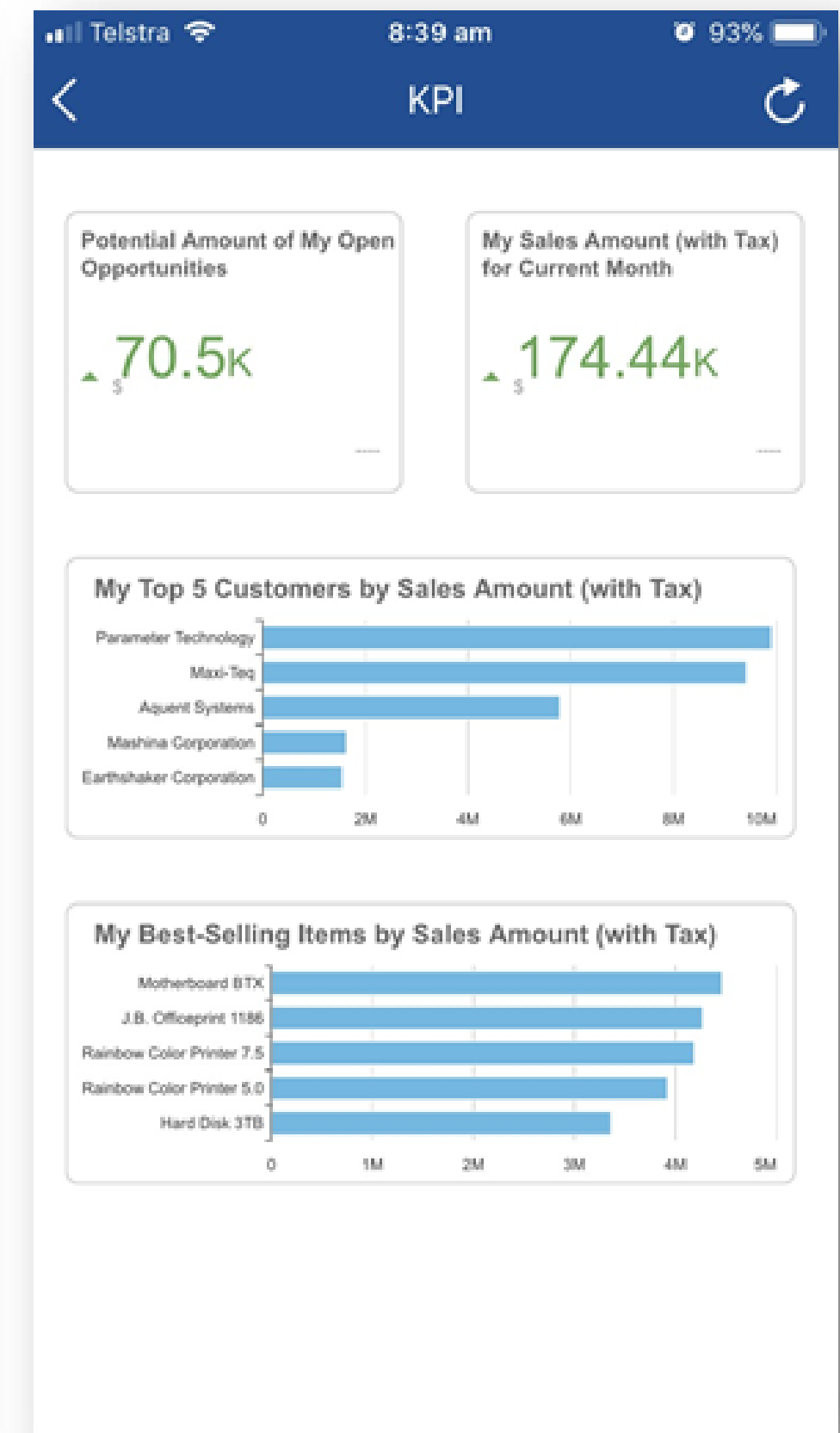
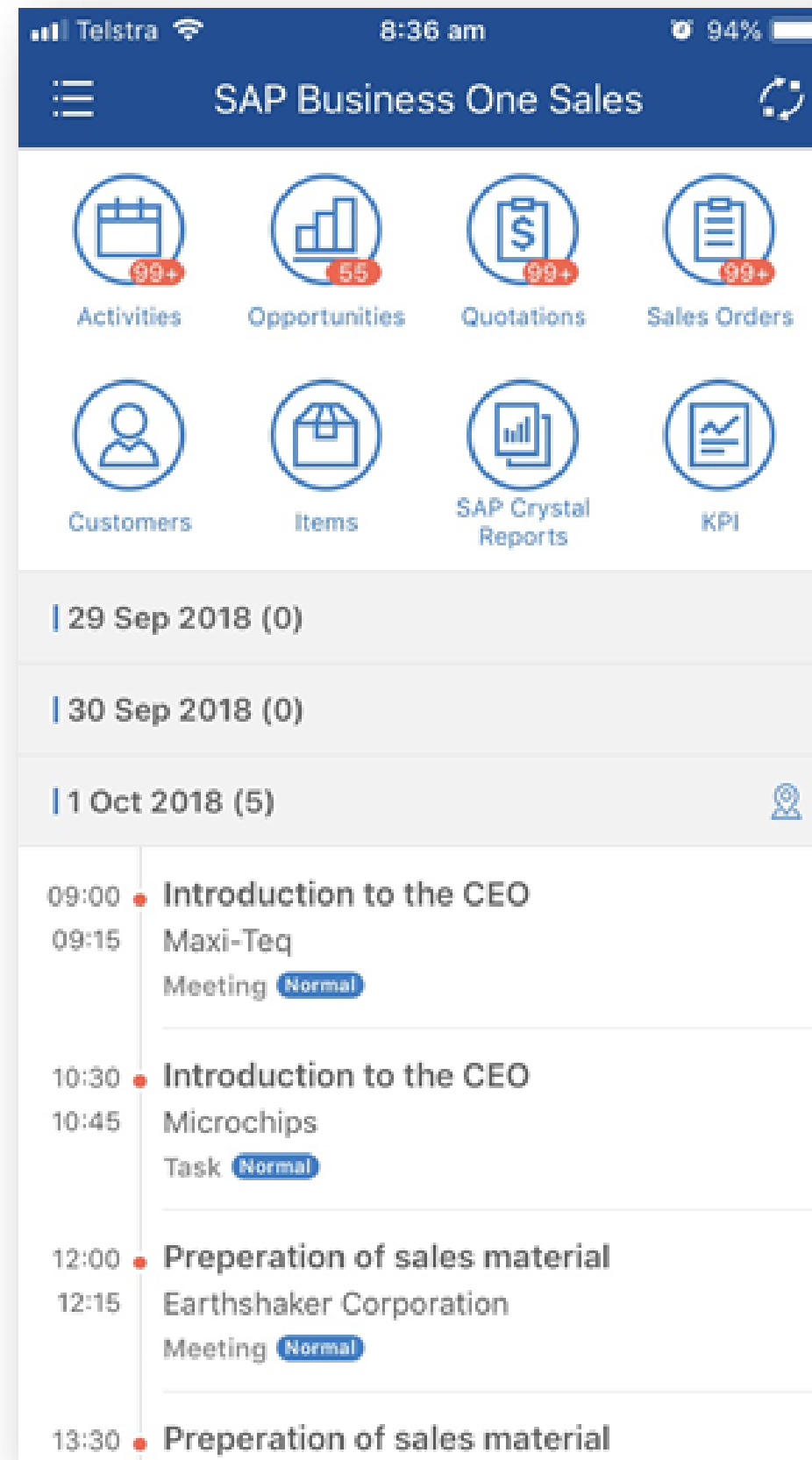
# Getting started

## Homepage

- Central access to all sales-relevant modules
- Shows number of open items
- Access to SAP Business One calendar and activities

## Key Performance Indicator(KPI) Screen shows user-specific dashboards:

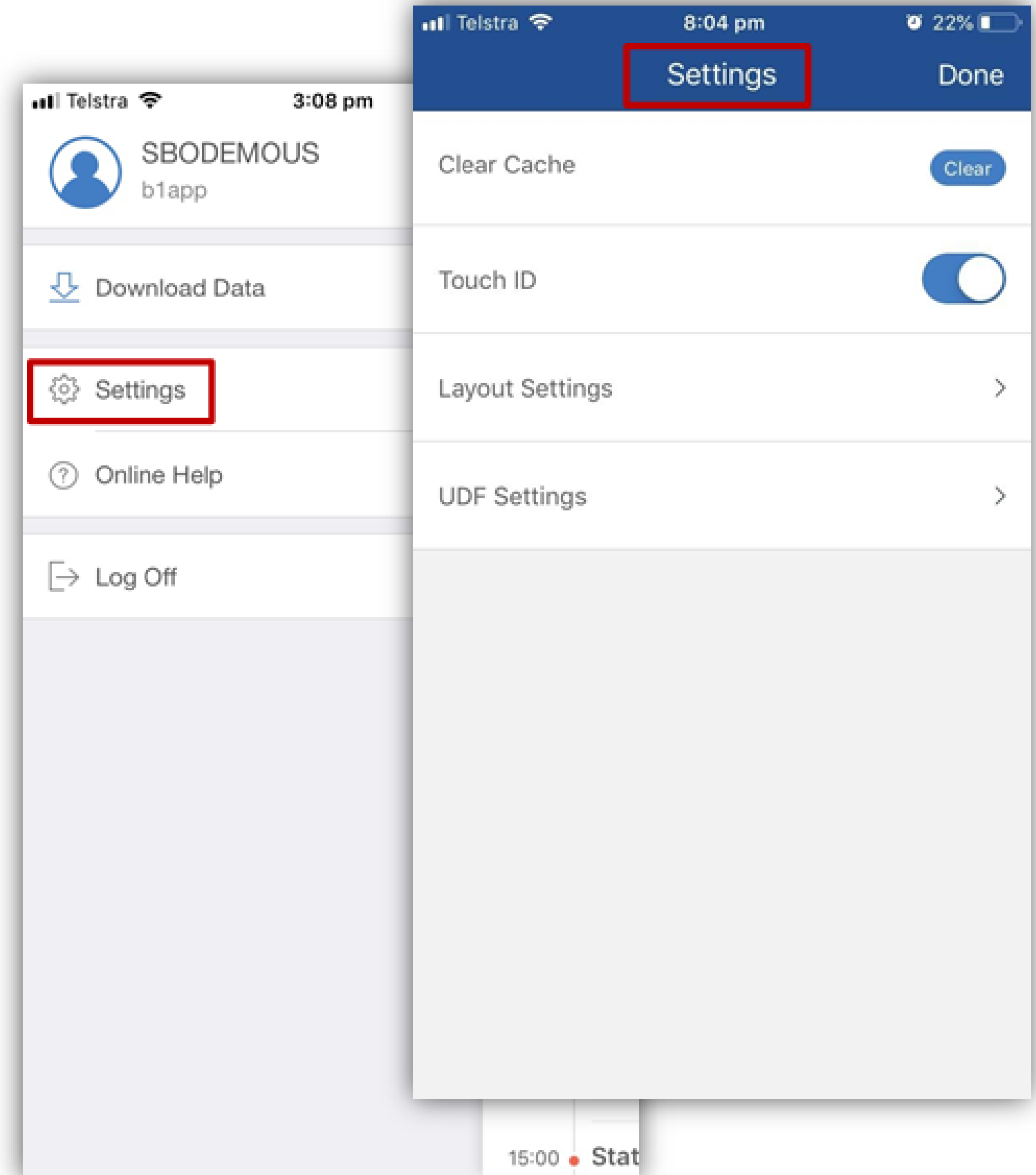
- Potential amounts of open opportunities
- Sales Order amount of the current month
- Top 5 customers
- Top 5 best-selling items



# Configuration settings

## Features

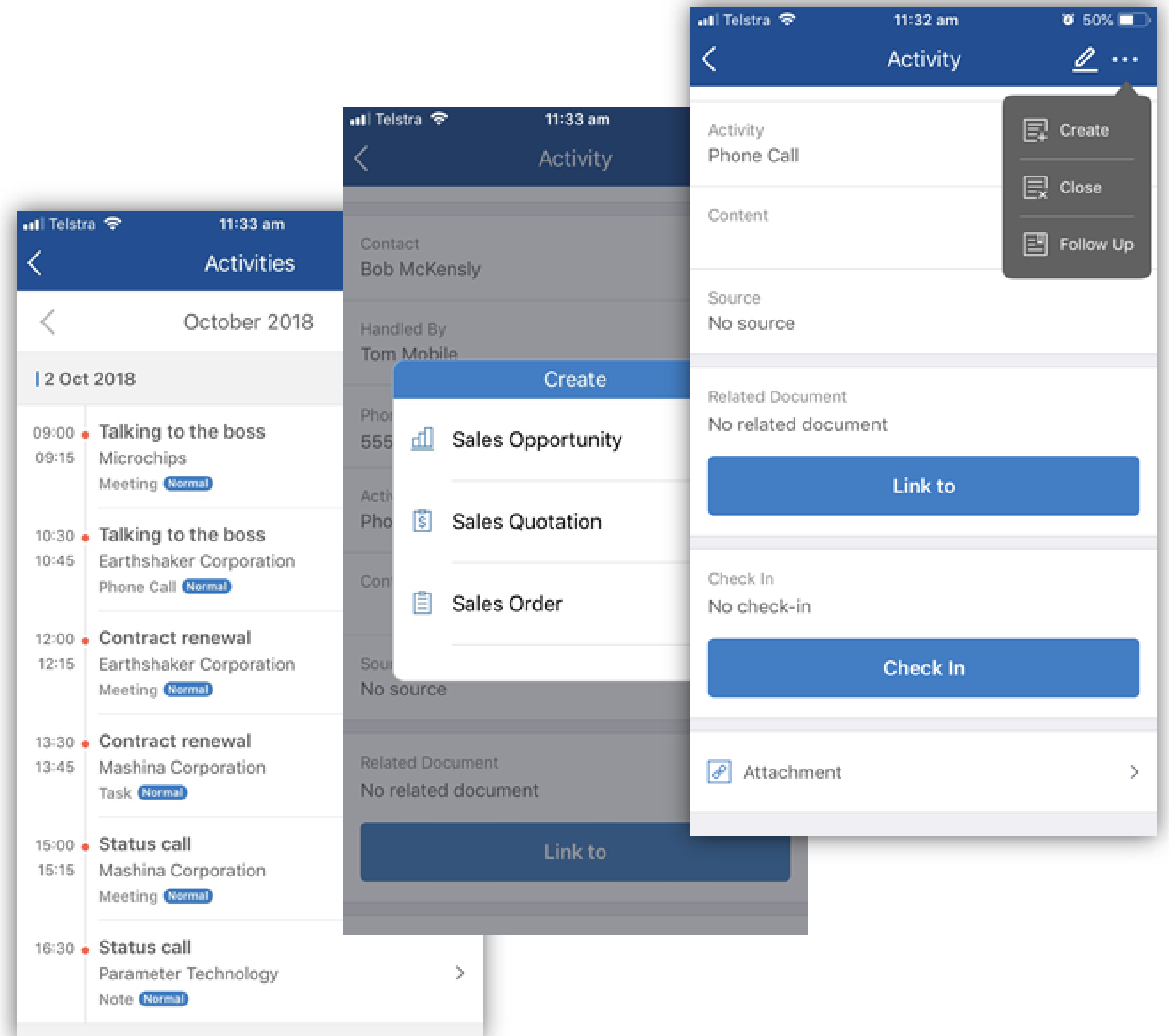
- Display your company name and user code
- Download and synchronize customer and item data for offline mode
- Clear Cache allows you to clear your current users data
- Define your document layout settings
- Display or hide user-defined fields (UDFs)
- Touch ID/Face ID configuration available depending on your mobile device
- Speech2Text capabilities
- Access online help
- Log out activities



# Managing activities

## Features

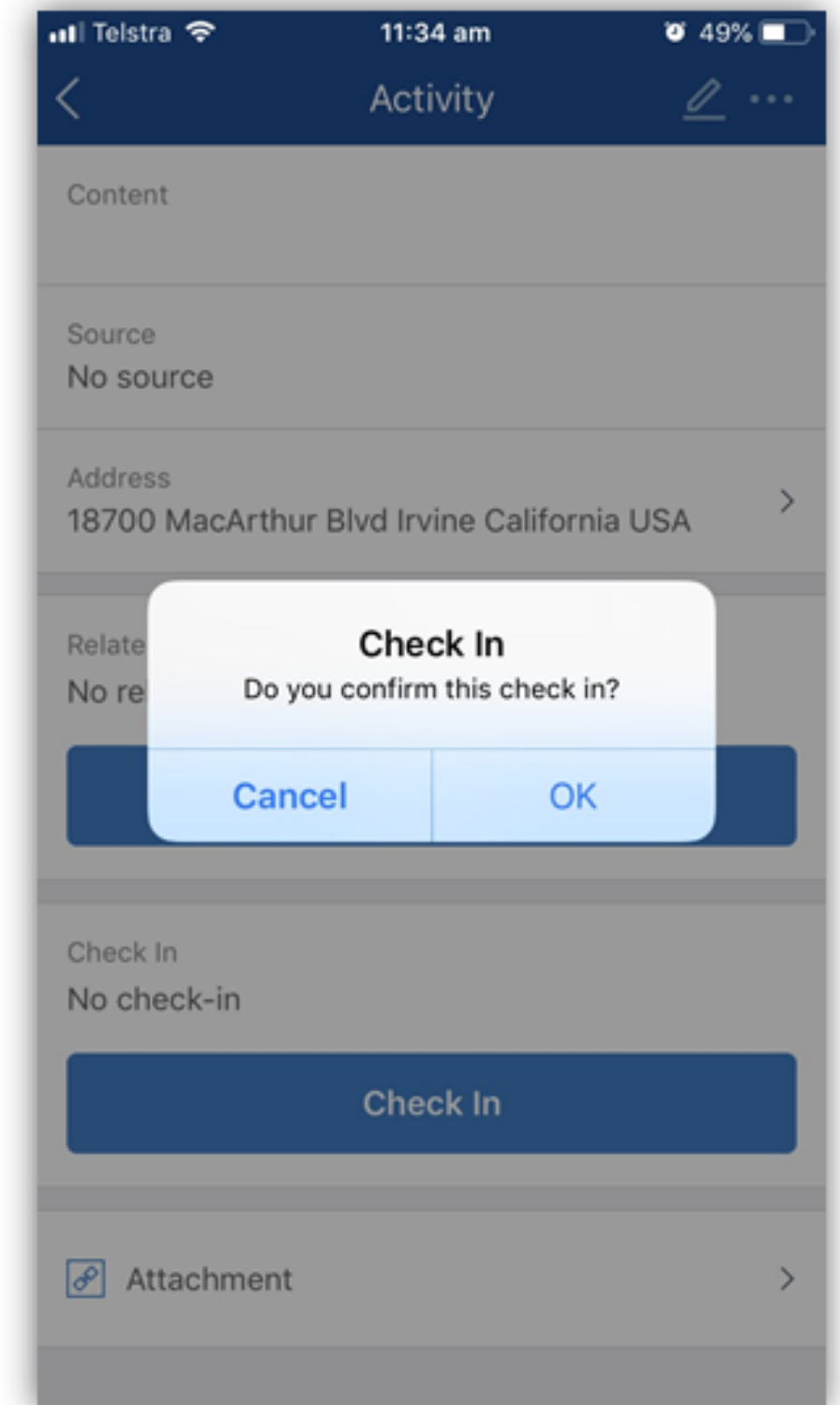
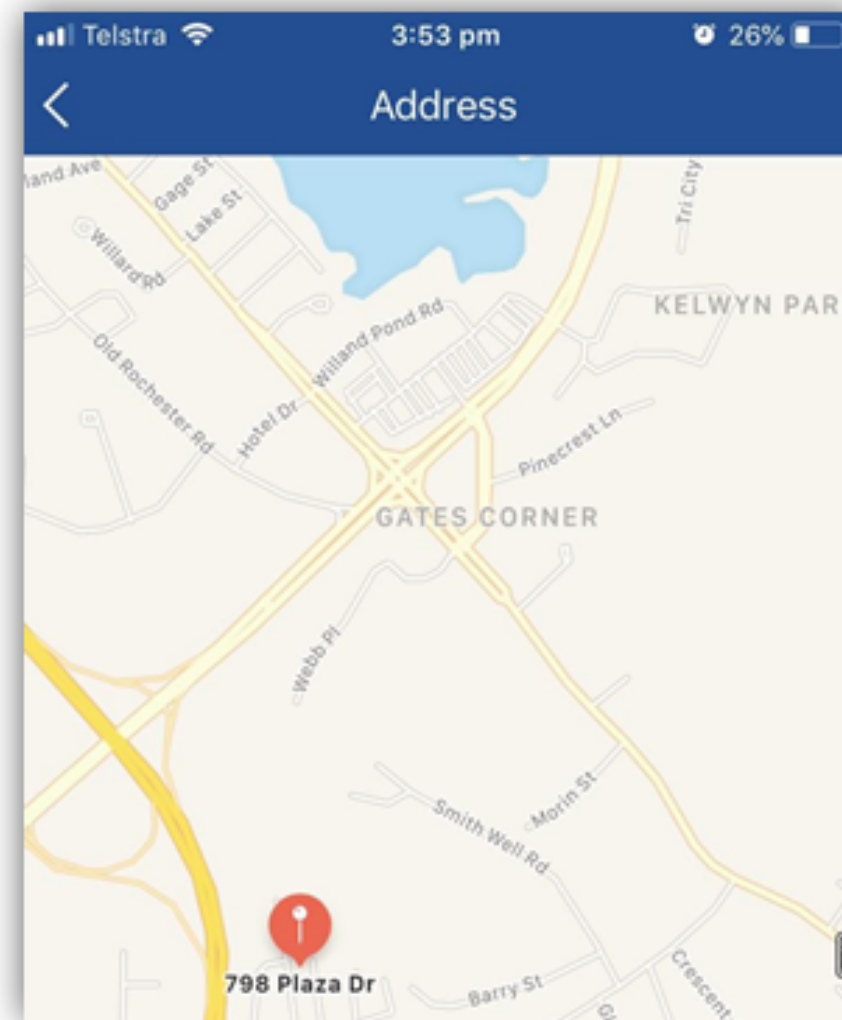
- View activities assigned to you in a calendar format
- Edit and close existing activities or create new activities
- Create follow-up activities
- Create sales opportunities, quotations, or orders based on activities
- Assign activities to a group recipient list
- Link related documents such as sales quotations or orders
- Upload attachments to activities



# Location based check-in

Powerful and convenient scenario to check-in location of sales activities

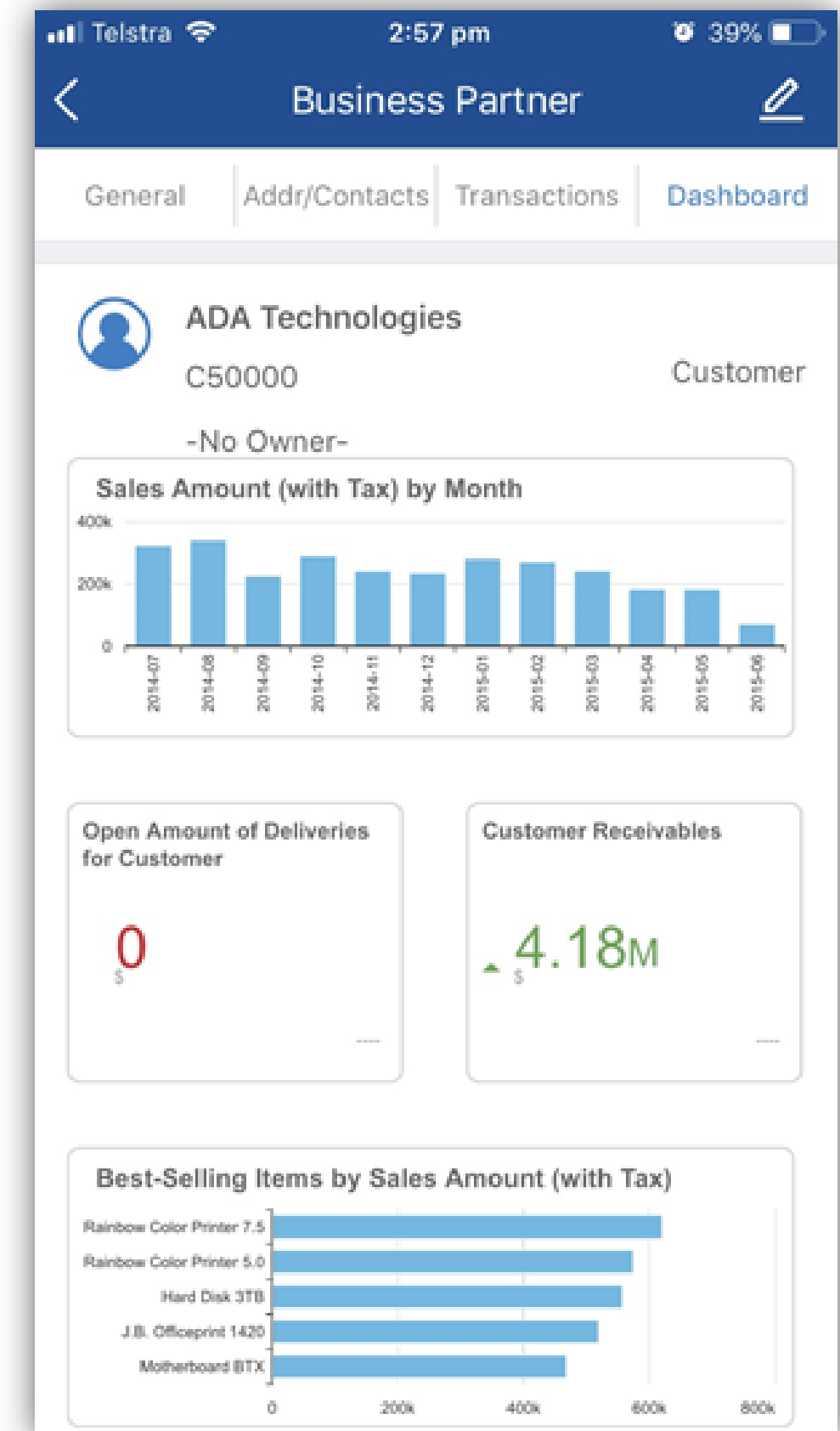
- Reports the location of an activity for every stage of the sales process
- Check-in data can be used for effective monitoring of activities by sales managers
- using a dedicated activity report within the SAP Business One client
- Multiple users assigned to the same activity can check in.
- Embedded in iOS/Google geographic services



# Managing customer data

## Features

- Create new customers or leads, view Business Partner details, including related activities, sales documents (sales quotations, sales orders, sales opportunities), special prices and account information
- Modify contact details, log new activities, initiate a phone call, email, or text messages directly
- Define a net, gross or mix price mode when adding, editing or viewing a business partner.
- Locate your contact on a map and plan a route
- Download/upload attachments to business partners
- Support of Business Partner data ownership function



# Managing customer data

## Features

- Filter by business partner type - Customer or Lead
- Sort by name, code, recency, frequency, monetary value, account balance, churn probability and more
- Customer is rated with 1-5 stars, based on frequency of orders and monetary values
- The churn field displays the customer attrition risk as well as the churn probability
- Average amount per sales order displayed next to the proposed re-order date
- Leads get displayed by industry, activity days

**Maxi-Teq** ★★★★★  
C20000

R: 1 days ago      F: 42.1 SOs/Yr      M: 31.6 M  
Account Balance: 7.2 M      Credit Limit Used: N/A      Churn: L (0%)

Proposed Reorder Date: 2018-10-10      59.0 K / SO

Customers

- Name
- Code
- Recency
- Frequency
- Monetary
- Account Balance
- R.F.M.

Customers

Customer | Lead

**Mashina Corporation** ★★★★★  
C42000

R: 1 days ago      F: 42.3 SOs/Yr      M: 31.4 M  
Account Balance: 6.6 M      Credit Limit Used: N/A      Churn: L (0%)

Proposed Reorder Date: 2018-10-10      58.6 K / SO

**Maxi-Teq** ★★★★★  
C20000

R: 1 days ago      F: 42.1 SOs/Yr      M: 31.6 M  
Account Balance: 7.2 M      Credit Limit Used: N/A      Churn: L (0%)

Proposed Reorder Date: 2018-10-10      59.0 K / SO

**Earthshaker Corporation** ★★★★★  
C40000

R: 1 days ago      F: 41.0 SOs/Yr      M: 31.2 M  
Account Balance: 6.9 M      Credit Limit Used: N/A      Churn: L (0%)

Proposed Reorder Date: 2018-10-10      59.9 K / SO

**Microchips** ★★★★★  
C30000

# Viewing items in stock

## Features

- View information about items in inventory, including
- unit price or in-stock quantity
- View the quantity of an item by warehouse location
- Select a net or gross price list for each item
- Search for items in inventory
- Check item in assigned price lists

Items			
A			
	A00001 J.B. Officeprint 1420	400.00 \$ -802	>
	A00002 J.B. Officeprint 1111	200.00 \$ 1,839	>
	A00003 J.B. Officeprint 1186	300.00 \$ -389	>
	A00004 Rainbow Color Printer 5.0	500.00 \$ 1,861	>
	A00005 Rainbow Color Printer 7.5	400.00 \$ -800	>
	A00006 Rainbow 1200 Laser Series	400.00 \$ 2,920	>
B			
	B10000 Printer Label	1.00 \$ 3,371	>
C			
	C00001 Motherboard BTX	400.00 \$ -1,133	>

Inventory by Warehouse			
All			
Available:	-802	In Stock:	1,305
Ordered:	2,808	Committed:	4,915
01 - General Warehouse			
Available:	-1,955	In Stock:	152
Ordered:	2,808	Committed:	4,915
02 - West Cost Warehouse			
Available:	484	In Stock:	484
Ordered:	0	Committed:	0
03 - Dropship Warehouse			
Available:	0	In Stock:	0
Ordered:	0	Committed:	0
04 - Consignment Warehouse			
Available:	669	In Stock:	669
Ordered:	0	Committed:	0
05 - Bin Warehouse			
Available:	0	In Stock:	0
Ordered:	0	Committed:	0

# Managing sales documents

## Features – orders and quotations

- Search, create and cancel sales quotations, and sales orders
- Update existing sales quotations and sales orders and manage activities related to these documents
- Users can update approved documents and draft documents with Pending or Approved status
- Sort documents by document number, BP name, document total or delivery date
- Copy sales quotations to sales orders
- View, add, edit and close activities related to sales quotations and sales orders
- Data ownership for documents

Open	All	Approval Status
●	357 - Web Customer	Pending
	2018-07-14	2,723.00 \$
●	361 - Mashina Corporation	Approved
	2018-07-13	1,431.00 \$
●	332 - SG Electronics	Rejected
	2018-07-11	8,995.00 \$
●	333 - Parameter Technology	Approved
	2018-07-09	21,670.00 \$
●	384 - Star Company	Approved
	2018-07-09	11,623.70 \$
●	357 - Aquent Systems	Pending
	2018-07-08	5,678.00 \$
●	360 - Mashina Corporation	Rejected
	2018-07-08	15,890.90 \$
●	343 - Microchips	Approved
	2018-07-07	7,834.00 \$

Posting Date		
Doc. No.		
BP Name		
Doc. Total		
Delivery Date		
●	3435 - Maxi-req	Open
	2018-10-02	80,300.39 \$
●	3434 - Microchips	Open
	2018-10-01	39,664.68 \$
●	3433 - Microchips	Open
	2018-10-01	115,202.65 \$
●	3432 - Earthshaker Corporation	Open
	2018-10-01	82,637.28 \$
●	3431 - Mashina Corporation	Open
	2018-10-01	86,850.29 \$
●	3430 - Earthshaker Corporation	Open
	2018-10-01	77,322.48 \$

# Managing sales opportunities

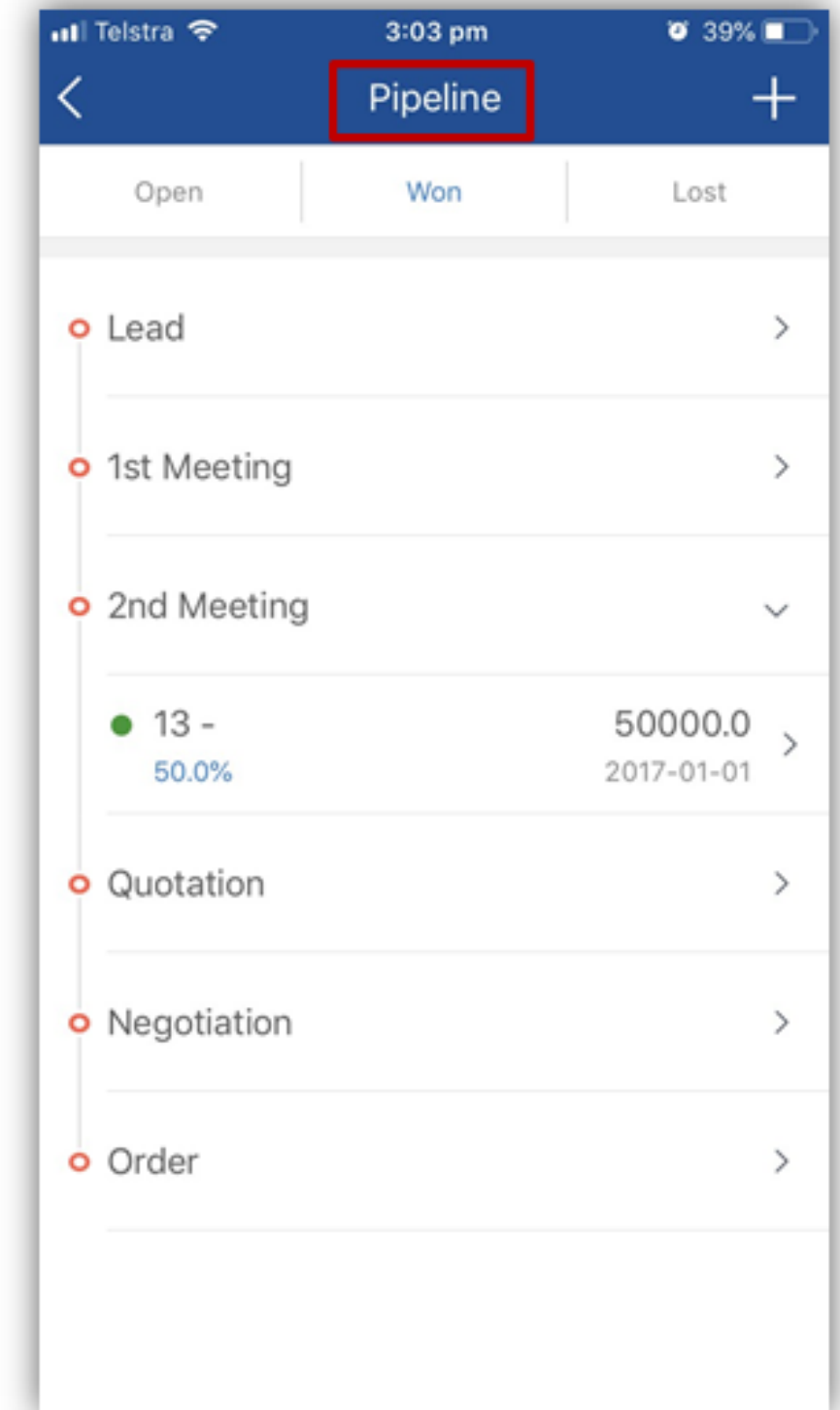
## Features

- Create, view, and search for sales opportunities
- View, edit, and create stages for sales opportunities
- Display all the sales opportunities in pipeline mode



This screenshot shows the 'Opportunities' list view in the SAP Sales Mobile App. The top navigation bar is blue with a back arrow, the title 'Opportunities', a search icon, a filter icon, and a plus icon. Below the navigation bar are four tabs: 'Open', 'Won', 'Lost', and 'Pipeline'. The 'Pipeline' tab is selected and highlighted with a red box. The main content area displays a list of sales opportunities. Each entry consists of a blue circle with a number, a percentage, a value, and a date, followed by a right-pointing chevron. The data is as follows:

Opportunity ID	Percentage	Value	Date
787 -	6.0%	2000.0	2018-10-12
782 -	6.0%	4000.0	2018-10-12
793 -	6.0%	1000.0	2018-10-12
780 -	6.0%	3000.0	2018-10-12
799 -	6.0%	4000.0	2018-10-12
774 -	6.0%	3000.0	2018-10-12
801 -	6.0%	3000.0	2018-10-12
803 -	6.0%	4000.0	2018-10-12



This screenshot shows the 'Pipeline' view in the SAP Sales Mobile App. The top navigation bar is blue with a back arrow, the title 'Pipeline' (highlighted with a red box), and a plus icon. Below the navigation bar are three tabs: 'Open', 'Won', and 'Lost'. The main content area displays a vertical pipeline of stages. Each stage is represented by a red circle with a number, followed by the stage name and a right-pointing chevron. The data is as follows:

Opportunity ID	Percentage	Value	Date
Lead			
1st Meeting			
2nd Meeting			
13 -	50.0%	50000.0	2017-01-01
Quotation			
Negotiation			
Order			

# Managing attachments

## Features

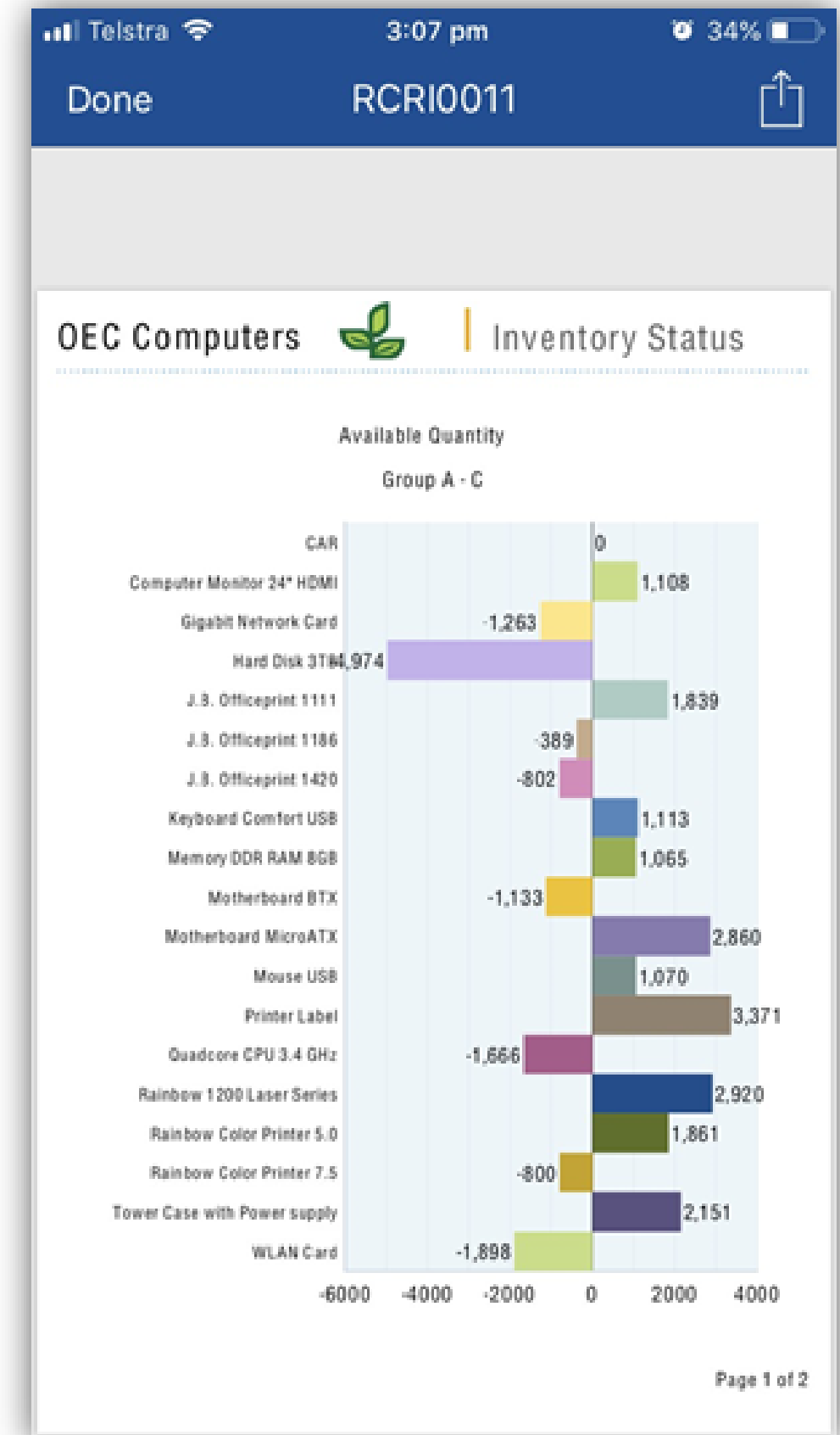
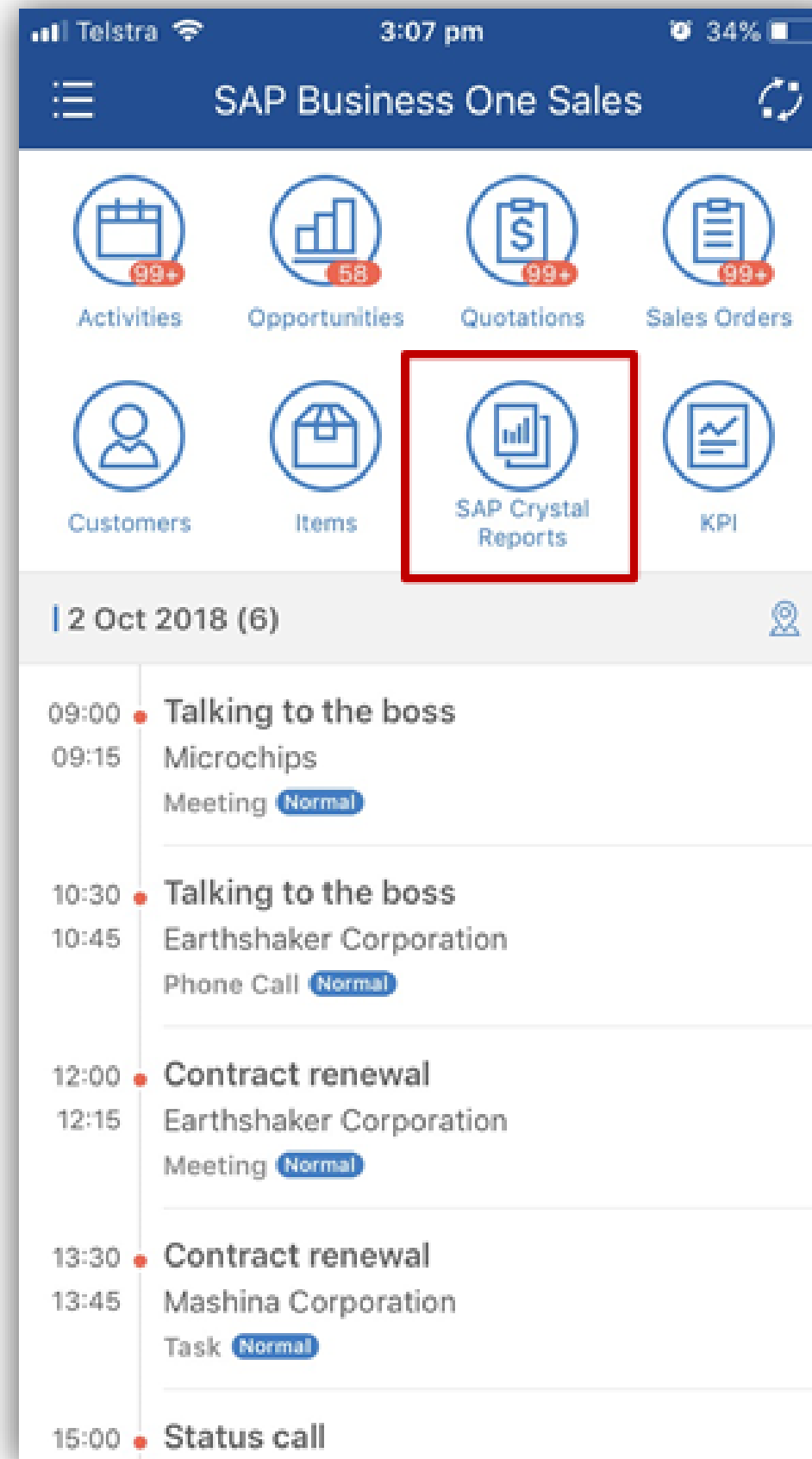
- View, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls
- Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears
- Upload attachments of image file types only, by either browsing to the required image file, or by taking a picture using your mobile device



# Crystal Reports

## Features

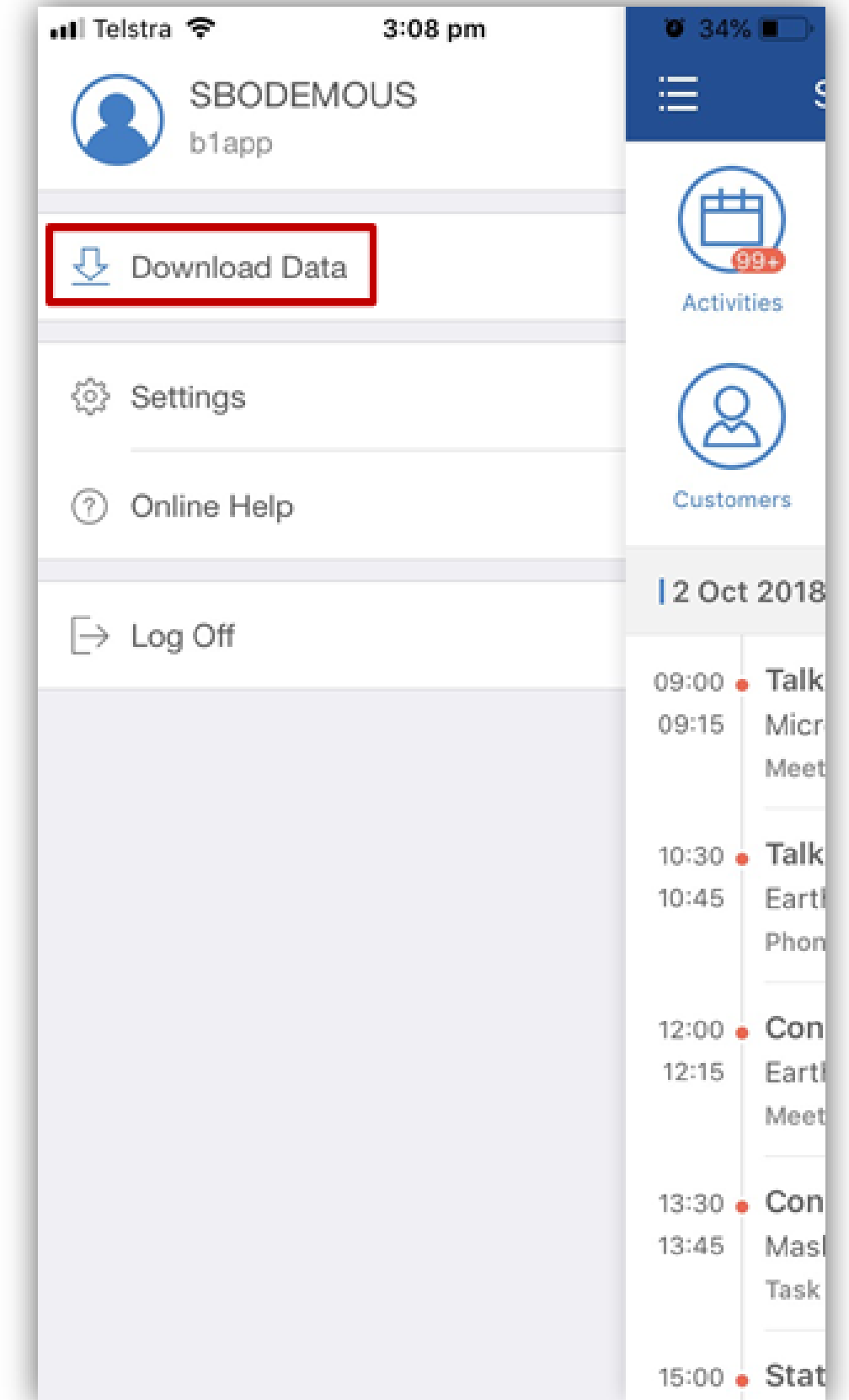
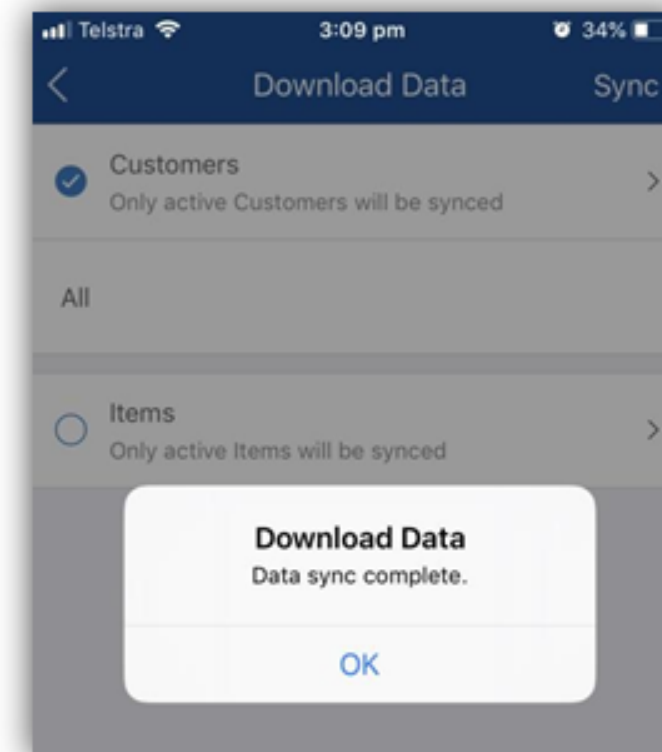
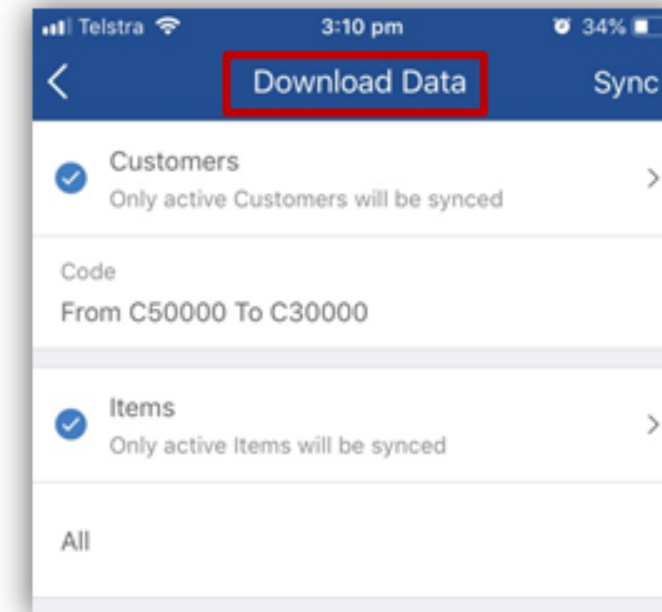
- New Crystal Report menu option for SAP Business One Sales.
- Easily view your SAP Business One crystal reports to make informed decisions on the run.
- Download and/or share your crystal reports easily with others.



# Data Synchronization for Offline Mode

## Features

- Business Partner & Items details can be downloaded in batches and viewed in offline mode.
- Large numbers of business partner data and items are able to be synchronized to your local mobile device easily.



# Caching for offline mode

## Features

- Business Partner & Items details can be downloaded in batches and viewed in offline mode.
- Large numbers of business partner data and items are able to be synchronized to your local mobile device easily.

