SYBASE®

User Guide

Sybase Mobile Sales for SAP® CRM 1.0

iPhone

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Contents

CHAPTER 1 Sybase Mobile Sales for SAP CRM

Sybase® Mobile Sales for SAP® CRM (Mobile Sales) gives you access to your important SAP sales data, and enables you to manage accounts, contacts, and activities with customers and prospects, all from your mobile device.

The SAP system downloads the relevant CRM data to your device. Much of the functionality of your native device integrates with Mobile Sales. You can work connected to the SAP server, or offline, when you do not have an Internet connection.

With Mobile Sales, you can:

- View all information necessary to manage your sales accounts. Capture and track critical information about prospects, customers, and partners.
- View and monitor the status and progress of your interactions.
- Track and qualify leads.
- Track and manage opportunities.
- Access real-time reports that provide visual forecasts, accurate pipeline data, top opportunities, and top risk opportunities.

Home Screen

The Mobile Sales home screen is where you access the main features of the application. Your system administrator determines which components (facets) you see, and may include the following:

- Accounts
- Contacts
- Activities
- Leads
- Opportunities
- Analytics
- Most Recent – lists the most recently viewed fact sheets, with the most recent on top.
- Notifications – displays all new activities, leads, and opportunites that are assigned to the user. Notifications also displays login failure messages during login to the SAP server, as well as messages for any updates, new activity creations, or new queries for reports during synchronization with the SAP server.
- Today's activities – lists all activities for today. Select an activity from this view to view its fact sheet. By default, this feature is turned off. To view today's activities, turn on **Today's Activities** in *Home Page Settings* on page 10.

Data Status Indictators

When creating or editing CRM information (objects), the application displays icons to indicate important information. Newly created or modified objects are placed in a pending state and wait for the SAP server to accept the changes. Until accepted by the SAP server, the changes are stored in the device database only. The SAP server replies in one of three ways:

- SAP server accepts the changes. Pending icon disappears.
- Pending icon changes to yellow triangle. You can choose to ignore (remove warning) or fix the issues.
- Pending icon changes to red error icon. You must fix or undo the changes.

Table 1. Data Status icons

Icon	Description
	Pending changes. If working offline, any new or updated information goes into a queue until the device goes online. The Mobile Sales application tags information in the queue with a Pending Changes icon. When an object has pending changes, you cannot edit it.
	Yellow triangle indicator. SAP server indicates warning messages associated with the data. You can ignore the messages or fix them. If you do not make the required edits to fix the warning, the warning remains. To clear the warnings, open the fact sheet and tap **Clear Messages**. If you want to fix the issues that caused the warnings, tap **Fix It**, which opens the object for editing. Make your changes, then tap **Done**. If you fix the issues, the object is pending until synchronized with the SAP server.
	Red error icon. SAP server has rejected the new or updated object. You must fix or undo the changes to clear the error. View error messages in the object's fact sheet. Select the message to view its details. If a record is rejected because of incorrect login information, the application displays a window for you to enter your correct password. After you enter the correct login information, you must manually edit the affected record again and save it.

Synchronization

After you initially connect to the SAP server and download CRM data, you can work online or offline. To begin using Mobiles Sales, you must initially connect to the SAP server and download Mobile Sales data. If you do not have network connectivity, you can work offline; however, you do not receive new data from the SAP system, and your device cannot save any changes you make back to the SAP server. Once online, when creating new or updating existing information, the information is synchronized with the SAP server. Once connected to the server, data is refreshed automatically.

Supported Devices

Sybase Mobile Sales for SAP CRM can run on these devices.

- Apple iPhone 3G, software version 3.1.x
- Apple iPhone 3GS, software version 3.1.x
- Apple iPod Touch 3G, software version 3.1.x

Note: For better performance, Sybase recommends using Apple iPhone 3GS.

See also

- *Installation Prerequisites* on page 3
- *Installing Mobile Sales on Your iPhone Device* on page 4
- *Chapter 8, Uninstalling the Mobile Sales Application* on page 47
- *Chapter 9, Troubleshooting* on page 49

Installation Prerequisites

Perform the prerequisites before installing Sybase Mobile Sales for SAP CRM.

See your system administrator to ensure you have an SAP account and Unwired Server account. For Unwired Server, be sure to note your user name, Unwired Server name, Unwired Server port number, activation code, and farm ID. If you are running Mobile Sales in demo mode (offline), you do not need to log in with SAP or Unwired Server connection information.

Note: Before installing Sybase Mobile Sales, be sure you have at least 5MB of free disk space on the device. How much disk space you need depends on how much data you need to store on your device.

See also

- *Supported Devices* on page 3
- *Installing Mobile Sales on Your iPhone Device* on page 4
- *Chapter 8, Uninstalling the Mobile Sales Application* on page 47
- *Chapter 9, Troubleshooting* on page 49

Installing Mobile Sales on Your iPhone Device

How you install Sybase Mobiles Sales for SAP CRM on your iPhone depends on how your company provisions the application.

Your company will choose a method for provisioning the application; meaning, your system administrator determines how you obtain and install the Mobile Sales application. The possible methods include:

- Download and install the application from the App Store.
- Obtain a copy of the application on your corporate network or through a link in an e-mail message, then use iTunes to install and synchronize it to your device.

See also

- *Connection Settings* on page 5
- *Supported Devices* on page 3
- *Installation Prerequisites* on page 3
- *Chapter 8, Uninstalling the Mobile Sales Application* on page 47
- *Chapter 9, Troubleshooting* on page 49

Installing Mobile Sales from App Store

Install Sybase Mobile Sales for SAP CRM from the App Store if using the application without customizations.

Prerequisites

Review the installation prerequisites.

1. On the iPhone home page, tap **App Store**.
2. Search for **Sybase**.
3. When the Sybase Mobile Sales results display, tap **Free**.
4. Tap **Free** again on the Mobile Sales information page.
5. Tap **Install** to download the application.

Next

Start the Mobile Sales application. You can run the application in either of two modes: demo or real company sales data.

- If you are evaluating the Mobile Sales application, run it in Demo mode, which contains sample data. You do not need to connect to the SAP system or Unwired Server.
- Connect to the SAP system and download Mobile Sales data to your device.

See *Starting Sybase Mobile Sales for SAP CRM* on page 6.

Installing Mobile Sales Using iTunes

Install Sybase Mobile Sales for SAP CRM using iTunes if your organization customized the application.

Prerequisites

Review the installation prerequisites.

1. Launch iTunes.
2. Download the application from your corporate network to your Applications library.
3. Sync the Mobile Sales application to your iPhone.

Next

Start the Mobile Sales application. You can run the application in either of two modes: demo or real company sales data.

- If you are evaluating the Mobile Sales application, run it in Demo mode, which contains sample data. You do not need to connect to the SAP system or Unwired Server.
- Connect to the SAP system and download Mobile Sales data to your device.

See *Starting Sybase Mobile Sales for SAP CRM* on page 6.

Connection Settings

View or change the connection and global application settings for the Sybase Mobiles Sales for SAP CRM application. You must indicate these settings before starting the application.

Sybase Settings enable to you to indicate the connection information to Unwired Server. You do not need to indicate connection settings if running Mobile Sales in Demo mode. From the iPhone home page, tap **Settings** > **Sybase**. Obtain this information from your system administrator and update this information before launching the application.

Table 2. Connection information

Option	Description
Server Name	Host name or IP address of Unwired Server.
Server Port	Message port number for Unwired Server.
Farm ID	Relay Server farm ID for the Unwired Server installation.

Option	Description
User Name	User name for your messaging device registration. Your system administrator uses Sybase Control Center to register your device.
Activation Code	Activation code that your system administrator created for this messaging device registration.
URL Prefix	(Optional) If your company is using a Relay Server with a custom configuration, enter the Relay-Server-specific URL.

Table 3. Sybase features

Option	Description
Mobile Sales	Enables the Mobile Sales application. The default is **ON**.
Mobile Workflow	Enables the Sybase Mobile Workflow for SAP Business Suite functionality. If Mobile Sales is **ON**, the Workflow functionality appears in the Mobile Sales application. If Mobile Sales if **OFF**, the Sybase Mobile Workflow launches as a standalone application.

Table 4. General

Option	Description
About	Displays Sybase copyright and Mobile Sales application version information.

See also

- *Installing Mobile Sales on Your iPhone Device* on page 4

Starting Sybase Mobile Sales for SAP CRM

Once you install the Sybase Mobile Sales for SAP CRM application on your device, you can launch it.

Prerequisites

Perform installation prerequisites. Be sure to indicate the connection settings for Unwired Server before launching the application, unless you are running the application in Demo mode.

1. Scroll to the page that contains the **Sybase** icon, then tap to launch.
    - Tap **Demo Application** if you want to evaluate the application. Mobile Sales prepares the sample data. Restart the application to begin, and tap **Demo Application** again. Skip the rest of these steps.
    - Tap **Setup Connection** to enter the Unwired Server connection information. Tap **OK** to acknowledge the pop-up message indicating that you enter the connection information from the Sybase page in the iPhone Settings application. From the iPhone home screen, select **Settings > Sybase**. Enter the connection information, then restart the application. Continue to the next step.
    - If you want to enable the Sybase Mobile Workflow for SAP® Business Suite application within Mobile Sales, select **Settings > Sybase**, then tap **On** for **Mobile Workflow**. Tap **Workflow** in the Tab bar to view the workflows. See *Sybase Mobile Workflow for SAP Business Suite User Guide for iPhone*.
2. Enter the SAP account and password.
3. Select **Language**, then click **Continue**.

The Mobile Sales application begins synchronizing data with the SAP system. The application home page appears after synchronization. It can take up to 30 minutes or longer to perform the initial synchronization with the SAP system. For best results, do not attempt to start or use the Mobile Sales application until the initial data download is complete. Tap **Notifications** in the tab bar to view the arrival of new activities, leads, and opportunities.

If you do not see data downloading from SAP server, tap **Notifications** on the application home page to make sure you are receiving new notifications from the SAP server. If you enter the incorrect login information, the system creates an invalid credentials notification. If you see this notification, tap it. The application prompts you to log in again with the proper credentials. If you are not receiving new notifications, verify your connection information is correct and that you are connected to the SAP system. See *Connection Settings* on page 5.

Unsubscribing and Resubscribing to Mobile Sales

Your system administrator may asked you to unsubscribe and resubscribe to the SAP system from your device.

For example, you need to unsubscribe from your device before you can resubscribe as a different user, or your system administrator may ask you to unsubscribe before uninstalling and upgrading to a new version of Mobile Sales. When you unsubscribe, all Mobile Sales data is deleted from your device.

When you unsubscribe:

- You must have network connectivity. If you are offline when you unsubscribe, it occurs once you have network connectivity.
- Any pending updates are pushed to the SAP server.

- Pending edits that have not been synchronized with the SAP server are canceled.
- Any pending changes from the SAP server to your device are ignored.

1. From the Mobile Sales home page, select **Settings > General > Connection Information**.
2. Tap **Unsubscribe**.
3. Select **OK** to confirm you want to unsubscribe.
4. Exit the Mobile Sales application, restart it, then resubscribe with your new login information.

Personalization

Personalize Sybase Mobile Sales for SAP CRM by modifying the default settings.

Before you can change settings, you must install the installation prerequisites, install the Mobile Sales application, connect to Unwired Server, and complete the initial download of Mobile Sales data from the SAP system.

You can access the Mobile Sales settings from within the Mobile Sales application. Tap **Settings** on the Tab bar at the bottom of the screen.

General Settings

View or change the General settings for the Sybase Mobiles Sales for SAP CRM application.

General settings enable to you to change overall application settings. Tap **Settings > General** to view or change.

Table 5. General settings

Option	Description
Connection Information	Displays connection and subscription status. Tap **Unsubscribe** to disconnect from the SAP server and delete all data stored locally on your device.
Change Password	Enter or change the password to access the SAP server. Check with your system administrator before changing this password.
Sign Out on Exit	Indicates that you need to indicate a Mobile Sales password when you start the application. Mobile Sales prompts you to define the password the first time you start Mobile Sales after selecting this option. The password must be at least four numeric digits.

Option	Description
GeoCorder Key	(Optional) Enter the key for the NAVTEQ maps, so that you can view account and contact addresses on a map from within the Mobile Sales application. Your company must purchase this service directly from NAVTEQ.
GeoCorder Server	(Optional) Enter the NAVTEQ server name.
Log Level Settings	Log Level settings indicate the depth of details to capture in the error log. • Off – displays no information or error messages in the error log. • Fatal – provides information about severe errors that might cause the application to abort. • Error – provides information about internal or unexpected errors that might allow the application to continue running. • Warn – provides information that indicates potentially harmful situations. • Info – provides information messages that indicate the progress of an operation. • Debug – provides details useful to debug the application (for system administrators or developers).
About	Displays version and legal information for the Mobiles Sales application.

See also

- *Home Page Settings* on page 10
- *Recent Items Settings* on page 10
- *Accounts Settings* on page 11
- *Contacts Settings* on page 11
- *Activities Settings* on page 12
- *Leads Settings* on page 13
- *Opportunities Settings* on page 14

Home Page Settings

View or change the Home Page settings for the Sybase Mobiles Sales for SAP CRM application.

Home Page settings enable you to customize the home page, include whether to display the date and today's activities, along with the activity type and activity status. Tap **Settings** > **Home Page** to view or change.

Table 6. Home Page settings

Option	Description
Date	Indicates if the date appears on the home page.
Today's Activities	Indicates if today's activities appear on the home page.
Type	Indicates whether to display the activity type.
Status	Indicates whether to display the activity status.

See also

- *General Settings* on page 8
- *Recent Items Settings* on page 10
- *Accounts Settings* on page 11
- *Contacts Settings* on page 11
- *Activities Settings* on page 12
- *Leads Settings* on page 13
- *Opportunities Settings* on page 14

Recent Items Settings

View or change the Recent Items settings for the Sybase Mobiles Sales for SAP CRM application.

Recent Items settings enable you to indicate how many recent items are displayed for accounts, contacts, activities, leads, and opportunities, as well as how many items display for **Most Recent** in the tab bar. Tap **Settings** > **Recent Items** to view or change.

See also

- *General Settings* on page 8
- *Home Page Settings* on page 10
- *Accounts Settings* on page 11
- *Contacts Settings* on page 11
- *Activities Settings* on page 12

- *Leads Settings* on page 13
- *Opportunities Settings* on page 14

Accounts Settings

View or change the Accounts settings for the Sybase Mobiles Sales for SAP CRM application.

Accounts settings enable you to indicate what information appears in the accounts list. Tap **Settings** > **Accounts** to view or change.

Table 7. Accounts settings

Option	Description
City	Indicates whether to display the city for the account in the accounts list.
Region	Indicates whether to display the region for the account in the accounts list.
Country	Indicates whether to display the the country in the accounts list.
Account ID	Indicates whether to display the account ID in the accounts list.
Map Standard Radius	Indicates the radius when displaying all accounts near your current location. The default is 5 miles.

See also

- *General Settings* on page 8
- *Home Page Settings* on page 10
- *Recent Items Settings* on page 10
- *Contacts Settings* on page 11
- *Activities Settings* on page 12
- *Leads Settings* on page 13
- *Opportunities Settings* on page 14

Contacts Settings

View or change the Contacts settings for the Sybase Mobiles Sales for SAP CRM application.

Contacts settings enable you to indicate what information and how it appears in the contacts list and contact details. Tap **Settings** > **Contacts** to view or change.

Table 8. Contacts List settings

Option	Description
Account Name	Indicates whether to display the account name for the contact in the contacts list.
View Personal Contact	Indicates whether to display personal contacts in the contacts list.
Sort Order	Indicates the sort order by name in the contacts list: **Last, First** or **First, Last**.
Display Order	Displays the contacts alphabetically by last name, first name or first name, last name based on the Sort Order.
Map Standard Radius	Indicates the radius when displaying all contacts near your current location. The default is 5 miles.

Table 9. Contact Details settings

Option	Description
Display On Screen	Indicates whether to display **Work Info** or **Address & Communication** information (alternate contact information) for the contact in the contact fact sheet.

See also

- *General Settings* on page 8
- *Home Page Settings* on page 10
- *Recent Items Settings* on page 10
- *Accounts Settings* on page 11
- *Activities Settings* on page 12
- *Leads Settings* on page 13
- *Opportunities Settings* on page 14

Activities Settings

View or change the Activities settings for the Sybase Mobiles Sales for SAP CRM application.

Activities settings enable you to indicate what information appears in the activities list. Tap **Settings** > **Activities** to view or change.

Table 10. Activities settings

Option	Description
Status	Indicates whether to display activity status in the activities list.
Date	Indicates whether to display the activity date in the activities list. The activity date is the date and time the activity was created on the device.
Time	Indicates whether to display the activity time in the activities list.

See also

- *General Settings* on page 8
- *Home Page Settings* on page 10
- *Recent Items Settings* on page 10
- *Accounts Settings* on page 11
- *Contacts Settings* on page 11
- *Leads Settings* on page 13
- *Opportunities Settings* on page 14

Leads Settings

View or change the Leads settings for the Sybase Mobiles Sales for SAP CRM application.

Leads settings enable you to indicate what information appears for the lead in the leads list. Tap **Settings** > **Leads** to view or change.

Table 11. Leads settings

Option	Description
Status	Indicates whether to display the status for the lead in leads list.
Start Date	Indicates whether to display the start date for the lead in leads list.
End Date	Indicates whether to display the end date for the lead in leads list.

See also

- *General Settings* on page 8
- *Home Page Settings* on page 10
- *Recent Items Settings* on page 10

- *Accounts Settings* on page 11
- *Contacts Settings* on page 11
- *Activities Settings* on page 12
- *Opportunities Settings* on page 14

Opportunities Settings

View or change the Opportunities settings for the Sybase Mobiles Sales for SAP CRM application.

Opportunities settings enable you to indicate what information appears for the opportunities in the opportunities list. Tap **Settings** > **Opportunities** to view or change.

Table 12. Opportunities settings

Option	Description
Chance of Success	Indicates whether to display the chance of success information for the opportunity in opportunities list.
Status	Indicates whether to display the status for the opportunity in opportunities list.
Account Name	Indicates whether to display the associated account name for the opportunity in opportunities list.
Start Date	Indicates whether to display the start date for the opportunity in opportunities list.
Closing Date	Indicates whether to display the closing date for the opportunity in opportunities list.
Sales Stage	Indicates whether to display the sales stage for the opportunity in opportunities list.

See also

- *General Settings* on page 8
- *Home Page Settings* on page 10
- *Recent Items Settings* on page 10
- *Accounts Settings* on page 11
- *Contacts Settings* on page 11
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Notifications

Displays all new activities, leads, and opportunites that are assigned to the user. Notifications also displays login failure messages during login to the SAP server or synchronization with the SAP server for any updates, new activity creations, or new queries for reports.

You can view your notifications, delete an invidual notification, or clear all notifications. You can also reset your password from the notification that indicates a login failure. Notifications display in descending date order, with the most recent on top.

Viewing Notifications

View your notifications, which list all new activities, leads, and opportunities assigned to you. You receive notifications only when the Mobile Sales application is running.

1. From the home screen, tap **Notifications**.
2. Tap an individual notification to view its details.

See also

- *Deleting and Clearing Notifications* on page 15
- *Resetting Your Password in Notifications* on page 15

Deleting and Clearing Notifications

Delete an individual notification, or clear all notifications.

1. From the home screen, tap **Notifications**.
2. Delete a notification or clear all notifications.

To	Do this
Delete a notification	Swipe the notification, then tap **Delete**.
Clear all notifications	Tap **Clear**.

See also

- *Viewing Notifications* on page 15
- *Resetting Your Password in Notifications* on page 15

Resetting Your Password in Notifications

Reset your password through the login failture notification, if you entered the wrong password when you logged into the SAP server.

1. From the home screen, tap **Notifications**.

2. Find the notification that indicates the login failure, then tap it to display its details.
3. Tap **Reset** to change your password.

See also

- *Viewing Notifications* on page 15
- *Deleting and Clearing Notifications* on page 15

CHAPTER 2 Account Management

Manage account details. You can search, modify, and view accounts, as well as the activities, leads, and opportunities associated with an account.

See also

- *Chapter 3, Contacts Management* on page 25
- *Chapter 4, Activity Management* on page 33
- *Chapter 5, Lead Management* on page 39
- *Chapter 6, Opportunity Management* on page 41
- *Chapter 7, Analytics* on page 43

Searching Accounts

Narrow the results to find a specific account.

To find an account quickly, you can use a text string to narrow the list of accounts.

1. On the home screen, select **Accounts**.
2. Tap the **Search** box, then enter a text string to narrow the results.

   By default, **All** accounts appear. You can further narrow the search parameters by selecting **Name**, **City**, or **State**.
3. Select the account to view.

See also

- *Viewing Accounts* on page 19
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 22
- *Updating Account Details* on page 23

Viewing an Account Address on a Map

View the address for an account on a map.

1. On the home screen, select **Accounts**.
2. Select the account to view its fact sheet.
3. Tap the address to see the location on a map.

The map displays within the Mobile Sales application (NAVTEQ service), or launches a browser and displays the location on Google Maps.

4. (Optional) Double-tap to zoom in.

See also

- *Displaying Driving Directions to an Account* on page 18
- *Finding All Accounts Near Current Location* on page 18

Displaying Driving Directions to an Account

Display driving directions to an account using Google Maps.

1. On the home screen, select **Accounts**.
2. Select the account to view its fact sheet.
3. Tap the address to see the location on a map.

   The map displays within the Mobile Sales application (NAVTEQ service), or launches a browser and displays the location on Google Maps.
4. If viewing the map within Mobile Sales, tap **Google Map** to launch Google Maps in a browser so you can get driving directions to the account.

See also

- *Viewing an Account Address on a Map* on page 17
- *Finding All Accounts Near Current Location* on page 18

Finding All Accounts Near Current Location

View on map all accounts near your current location.

This feature is available if your company purchased the NAVTEQ map service. You can indicate the radius for the search in the Mobile Sales Accounts Settings. The default is 5 miles.

1. On the home screen, select **Accounts**.
2. Tap **Map**.

   The map displays the accounts near your current location.

See also

- *Viewing an Account Address on a Map* on page 17
- *Displaying Driving Directions to an Account* on page 18

Viewing Accounts

View existing accounts.
On the home screen, select **Accounts**.

To	Do this
View the account fact sheet, which displays account details	Select the account.
View accounts that starts with a specific letter	On the right side of the screen, tap the appropriate letter.
View recently viewed accounts	Tap **Recent**. The Recent Accounts screen lists the account fact sheets you recently viewed, with the most recent on top.

See also

- *Searching Accounts* on page 17
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 22
- *Updating Account Details* on page 23

Viewing Relationships for an Account

View the contacts who have a relationship with an account.

1. On the home screen, select **Accounts**.
2. Select an account to display the account fact sheet.
3. Near the bottom of the screen, select **Relationships**.
4. Select the relationship to view its details.

See also

- *Viewing Activities for an Account* on page 20
- *Viewing Leads for an Account* on page 20
- *Viewing Opportunities for an Account* on page 20
- *Viewing Account Interaction History* on page 21
- *Viewing the Account Web Page* on page 21

Viewing Activities for an Account

View the activities associated with an account.

1. On the home screen, select **Accounts**.
2. Select an account to view its fact sheet.
3. Near the bottom of the screen, select **Activities**.
4. (Optional) Tap **Recent** or **Today** to narrow the list.
5. Select an activity to view its fact sheet, or to add or edit the notes for the activity.

See also

- *Viewing Relationships for an Account* on page 19
- *Viewing Leads for an Account* on page 20
- *Viewing Opportunities for an Account* on page 20
- *Viewing Account Interaction History* on page 21
- *Viewing the Account Web Page* on page 21

Viewing Leads for an Account

View leads for an account.

1. On the home screen select **Accounts**.
2. Select an account to view its fact sheet.
3. Near the bottom of the screen, select **Leads**.
4. (Optional) Select **Recent** or **Current**.

   Recent lists the recently opened items. Current lists the leads whose status is current.
5. Select the lead to view its fact sheet.

See also

- *Viewing Relationships for an Account* on page 19
- *Viewing Activities for an Account* on page 20
- *Viewing Opportunities for an Account* on page 20
- *Viewing Account Interaction History* on page 21
- *Viewing the Account Web Page* on page 21

Viewing Opportunities for an Account

View opportunities for an account.

1. On the home screen, select **Accounts**.
2. Select an account to view the account fact sheet.

3. Near the bottom of the screen, select **Opportunities**.
4. (Optional) Select **Recent** or **Current**.

   Recent opens recently viewed opportunities. Current opportunities are those that do not have a status of Closed or the closing date has not passed.
5. Select the opportunity to view its fact sheet.
   a) Select **Items** to view potential sales orders.
   b) Select **Notes** to add or edit the notes for this opportunity.

See also

- *Viewing Relationships for an Account* on page 19
- *Viewing Activities for an Account* on page 20
- *Viewing Leads for an Account* on page 20
- *Viewing Account Interaction History* on page 21
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Viewing Account Interaction History

View the interaction history for the account.

The interaction history for an account includes interaction type for activities, leads, opportunities, the status for each interaction, and the relative time period (past, current, future).

1. On the home screen, select **Accounts**.
2. Select an account to view the account fact sheet.
3. Near the bottom of the screen, select **Interactions**.
4. Select the data view: **Period**, **Status**, or **Type**.
5. Select the interaction to view its details.

See also

- *Viewing Relationships for an Account* on page 19
- *Viewing Activities for an Account* on page 20
- *Viewing Leads for an Account* on page 20
- *Viewing Opportunities for an Account* on page 20
- *Viewing the Account Web Page* on page 21

Viewing the Account Web Page

Launch the Web page associated with the account.

1. On the home screen, select **Accounts**.

2. Select an account to view its fact sheet.
3. Select the **Website** URL to open the Web site in a browser.

See also

- *Viewing Relationships for an Account* on page 19
- *Viewing Activities for an Account* on page 20
- *Viewing Leads for an Account* on page 20
- *Viewing Opportunities for an Account* on page 20
- *Viewing Account Interaction History* on page 21

Calling the Account Phone Number

Call the account from within the Account details screen.

1. On the home screen, select **Accounts**.
2. Select an account to view its fact sheet.
3. Select the phone number to call.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 19
- *E-mailing an Account* on page 22
- *Updating Account Details* on page 23
- *Logging a Phone Call as an Activity* on page 35

E-mailing an Account

E-mail an account from the Account details screen.

1. On the home screen, select **Accounts**.
2. Select an account to view its fact sheet.
3. Select the **E-mail** address.
4. Enter the e-mail text, then select **Send**.
5. In the **New Activity** screen, tap **Cancel** if you do not want to log the e-mail as a Mobile Sales activity.

   If you want to log the e-mail as a Mobile Sales activity, enter a **Description**, tap **Done**, then **Done** again.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 19
- *Calling the Account Phone Number* on page 22

- *Updating Account Details* on page 23
- *Logging an E-mail as an Activity* on page 36

Updating Account Details

Update account details, such as address, phone numbers, fax number, e-mail, and Web site information.

You cannot update accounts with pending changes.

1. On the home screen, select **Accounts**.
2. Select an account to view its fact sheet.
3. Select **Edit**.
4. Update the information in the appropriate fields.
5. Update the information, tap **Done**, then tap **Done** again.

The account has pending changes until the device data is synchronized with the SAP system. If the SAP system rejects the changes, you receive a warning message. You must fix or undo the changes.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 19
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 22

Creating or Editing a Note for an Account

Create or edit a note for an account.

1. On the home screen, select **Accounts**.
2. Select an account to view its fact sheet.
3. Near the bottom of the screen, select **Notes**.
4. Tap the text input box, add or edit text for this note, then tap **Done**.

CHAPTER 3 Contacts Management

Manage your Sybase Mobile Sales for SAP CRM contacts. You can search, modify, and view contacts, as well as activities, leads, and opportunities associated with a contact.

See also

- *Chapter 2, Account Management* on page 17
- *Chapter 4, Activity Management* on page 33
- *Chapter 5, Lead Management* on page 39
- *Chapter 6, Opportunity Management* on page 41
- *Chapter 7, Analytics* on page 43

Searching Contacts

Search to find a contact.

To find a contact quickly, you can use a text string to narrow the list of contacts.

1. On the home screen, select **Contacts**.
2. Select on which fields you want to search: **All**, **First Name**, **Last Name**, or **Company**.
3. Tap the **Search** box, then enter a text string to narrow the results, then tap **Search**.
4. Select the contact to view.

See also

- *Viewing Contacts* on page 26
- *Updating Contact Details* on page 30
- *Saving a CRM Contact as a Personal Contact* on page 31
- *Creating or Editing a Note for a Contact* on page 32
- *Calling a Contact* on page 29
- *E-mailing a Contact* on page 30

Viewing a Contact Address on a Map

View the address for an account on a map.

1. On the home screen, select **Contacts**.
2. Select the contact to view its fact sheet.
3. Select the address to see the location on a map.

4. (Optional) Double-tap to zoom in.

Displaying Driving Directions to a Contact

Use Google Maps to display driving directions to an contact.

1. On the home screen, select **Contacts**.
2. Tap the contact to view its fact sheet.

   You can select the work address or personal address. Tap **Address & Communication Info** for the contact's personal address information.
3. Tap the address to see the location on a map.

   The map displays within the Mobile Sales application (NAVTEQ service), or launches a browser and displays the location on Google Maps.
4. If viewing the map within Mobile Sales, tap **Google Map** to get driving directions to the contact.

Finding All Contacts Near Current Location

View on map all contacts near your current location.

This feature is available if your company purchased the NAVTEQ map service. You can indicate the radius for the search in the Mobile Sales Accounts Settings. The default is 5 miles.

1. On the home screen, select **Contacts**.
2. Tap **Map**.

   The map displays the contacts near your current location.

Viewing Contacts

View existing contacts.
On the home screen, select **Contacts**.

To	Do this
View contact details	Select the contact.
Find a contact that starts with a specific letter	On the right side of the screen, tap the appropriate letter.
View recently viewed contacts	Tap **Recent**. The Recent Contacts screen lists the contact fact sheets you recently viewed, with the most recent on top.

See also

- *Searching Contacts* on page 25
- *Updating Contact Details* on page 30
- *Saving a CRM Contact as a Personal Contact* on page 31
- *Creating or Editing a Note for a Contact* on page 32
- *Calling a Contact* on page 29
- *E-mailing a Contact* on page 30

Viewing and Editing Alternate Contact Information

View alternative (personal) contact information.

If you converted the CRM contact to a personal contact, this information is the contact's alternate or personal information. If you change this alternate contact information, the Mobile Sales application synchronizes the information in both the Mobile Sales application and your native contacts list.

1. On the home screen, select **Contacts**.
2. Select a contact to view the contact fact sheet.
3. Near the bottom of the screen, tap **Address & Communication Info**.
4. (Optional) Select **Edit** to modify the information, then tap **Done**, then **Done** again when finished editing.

See also

- *Viewing Relationships for a Contact* on page 27
- *Viewing Activities for a Contact* on page 28
- *Viewing Leads for a Contact* on page 28
- *Viewing Opportunities for a Contact* on page 28
- *Viewing Contact Interaction History* on page 29

Viewing Relationships for a Contact

View the relationship details for a contact.

1. On the home screen, select **Contacts**.
2. Select a contact to view the contact fact sheet.
3. Select **Relationships**.
4. Select the relationship to view additional details.

See also

- *Viewing and Editing Alternate Contact Information* on page 27
- *Viewing Activities for a Contact* on page 28
- *Viewing Leads for a Contact* on page 28

- *Viewing Opportunities for a Contact* on page 28
- *Viewing Contact Interaction History* on page 29

Viewing Activities for a Contact

View the activities associated with a contact.

1. On the home screen, select **Contacts**.
2. Select a contact to view the contact fact sheet.
3. Near the bottom of the screen, select **Activities**.
4. (Optional) Click **Recent** or **Today** to narrow the list.
5. Select an activity to view its fact sheet, or to add or edit the notes for the activity.

See also

- *Viewing and Editing Alternate Contact Information* on page 27
- *Viewing Relationships for a Contact* on page 27
- *Viewing Leads for a Contact* on page 28
- *Viewing Opportunities for a Contact* on page 28
- *Viewing Contact Interaction History* on page 29

Viewing Leads for a Contact

View leads for a contact.

1. On the home screen, select **Contacts**.
2. Select a contact to view the contact fact sheet.
3. Near the bottom of the screen, select **Leads**.
4. (Optional) Select **Recent** or **Current**.
5. Select the lead to view its fact sheet.

See also

- *Viewing and Editing Alternate Contact Information* on page 27
- *Viewing Relationships for a Contact* on page 27
- *Viewing Activities for a Contact* on page 28
- *Viewing Opportunities for a Contact* on page 28
- *Viewing Contact Interaction History* on page 29

Viewing Opportunities for a Contact

View opportunities for a contact.

1. On the home screen, select **Contacts**.

2. Select a contact to view contact details.
3. Near the bottom of the screen, select **Opportunities**.
4. (Optional) Select **Recent** or **Current**.
5. Select an opportunity to view its fact sheet.
   a) Select **Items** to view potential sales orders and quantities.
   b) Select **Notes** to view or edit the notes for this opportunity.

See also

- *Viewing and Editing Alternate Contact Information* on page 27
- *Viewing Relationships for a Contact* on page 27
- *Viewing Activities for a Contact* on page 28
- *Viewing Leads for a Contact* on page 28
- *Viewing Contact Interaction History* on page 29

Viewing Contact Interaction History

View the interaction history for the contact.

The interaction history for an account includes interaction type (activities, leads, opportunities), the status for each interaction, and the relative time period (past, current, future).

1. On the home screen, select **Contacts**.
2. Select a contact to view the contact fact sheet.
3. Near the bottom of the screen, select **Interactions**.
4. Select the data view: **Period**, **Status**, or **Type**.
5. Select an item to view interaction details.
6. (Optional) Tap **Notes** to view or edit the note, then tap **Done**.

See also

- *Viewing and Editing Alternate Contact Information* on page 27
- *Viewing Relationships for a Contact* on page 27
- *Viewing Activities for a Contact* on page 28
- *Viewing Leads for a Contact* on page 28
- *Viewing Opportunities for a Contact* on page 28

Calling a Contact

Call a contact from within the Mobile Sales application.

1. On the home screen, select **Contacts**.

2. Select a contact to view the contact fact sheet.
3. Select the phone number to call.

See also

- *Searching Contacts* on page 25
- *Viewing Contacts* on page 26
- *Updating Contact Details* on page 30
- *Saving a CRM Contact as a Personal Contact* on page 31
- *Creating or Editing a Note for a Contact* on page 32
- *E-mailing a Contact* on page 30
- *Logging a Phone Call as an Activity* on page 35

E-mailing a Contact

E-mail a contact from the Contact details screen.

1. On the home screen, select **Contacts**.
2. Select a contact.
3. Tap the **Email** address.
4. Enter the e-mail text, then select **Send**.
5. In the **New Activity** screen, tap **Cancel** if you do not want to log the e-mail as a CRM activity.

   If you want to log the e-mail as a CRM activity, enter a **Description**, edit the information in any other applicable fields, then tap **Done**.

See also

- *Searching Contacts* on page 25
- *Viewing Contacts* on page 26
- *Updating Contact Details* on page 30
- *Saving a CRM Contact as a Personal Contact* on page 31
- *Creating or Editing a Note for a Contact* on page 32
- *Calling a Contact* on page 29
- *Logging an E-mail as an Activity* on page 36

Updating Contact Details

Update contact details, such as address, phone numbers, email, and Web site information.

You cannot update contacts with pending changes.

1. On the home screen, select **Contacts**.
2. Select the contact to view its fact sheet.
3. Select **Edit**.
4. Tap the field you want to update.

   If you update the alternate contact information, and the contact is also a personal contact, the Mobile Sales application synchronizes the changes in the native Contacts book.
5. Update the information, tap **Done**, then **Done** again.

You can see the Pending Changes icon at the top of the fact sheet and in the Contacts list view. The contact has pending changes until the device data is synchronized with the SAP system. If the SAP system rejects the changes, you receive a warning message. You must fix or undo the changes.

See also

- *Searching Contacts* on page 25
- *Viewing Contacts* on page 26
- *Saving a CRM Contact as a Personal Contact* on page 31
- *Creating or Editing a Note for a Contact* on page 32
- *Calling a Contact* on page 29
- *E-mailing a Contact* on page 30

Saving a CRM Contact as a Personal Contact

Save the CRM business contact as a personal contact.

Once the CRM contact is also a personal contact, the Mobile Sales application synchronizes the alternate contact information between the Mobile Sales application contact information and the device contacts book. However, if you update the CRM contact and the SAP server rejects the changes because of errors, Mobile Sales does not synchronize the updated data with the native contact until you fix the errors and the SAP system accepts the changes.

1. On the home screen, select **Contacts**.
2. Select a contact to view its fact sheet.
3. Tap **Convert to Personal Contact**, then tap **OK**.

See also

- *Searching Contacts* on page 25
- *Viewing Contacts* on page 26
- *Updating Contact Details* on page 30
- *Creating or Editing a Note for a Contact* on page 32
- *Calling a Contact* on page 29

- *E-mailing a Contact* on page 30

Creating or Editing a Note for a Contact

Create or edit a note for a contact.

1. On the home screen, select **Contacts**.
2. Select a contact to view its fact sheet.
3. Near the bottom of the screen, select **Notes**.
4. Tap the text input box, add or edit text for this note, then tap **Done**.

See also

- *Searching Contacts* on page 25
- *Viewing Contacts* on page 26
- *Updating Contact Details* on page 30
- *Saving a CRM Contact as a Personal Contact* on page 31
- *Calling a Contact* on page 29
- *E-mailing a Contact* on page 30

CHAPTER 4 Activity Management

Manage your Sybase Mobile Sales for SAP CRM activities. You can search, view, and create activities, as well as accounts and contacts associated with an activity. You can logs e-mails and phone calls as activities.

See also

- *Chapter 2, Account Management* on page 17
- *Chapter 3, Contacts Management* on page 25
- *Chapter 5, Lead Management* on page 39
- *Chapter 6, Opportunity Management* on page 41
- *Chapter 7, Analytics* on page 43

Searching and Viewing Activities

Search to find an activity.

To find an activity quickly, you can use a text string to narrow the list of activities.

1. On the home screen, select **Activities**.
2. View or search activities.

To	Do this
View recent activities	Tap **Recent**. The Recent Activities list displays the most recently created activities, with the most recent on top.
Search activities	Tap the Search box. Enter a text string to narrow the results, or select on which fields you want to search: **All**, **Title**, **Type**, or **Status**.

3. Select the activity to view its fact sheet.

See also

- *Adding a New Activity for Account or Contact* on page 34
- *Adding an Existing Activity to Account or Contact* on page 35
- *Logging a Phone Call as an Activity* on page 35
- *Logging an E-mail as an Activity* on page 36

Adding a New Activity for Account or Contact

Add a new activity to an account or contact, or both.

1. On the home screen, select **Activities**.
2. Tap Add New Activity .
3. In the **New Activity** screen, select the activity type.
   - Appointment
   - Incoming Call
   - Incoming E-Mail
   - Meeting
   - Outgoing E-Mail
   - Outgoing Phone Call
   - Task

   Your SAP system might have more or different choices.
4. Add a **Description** for the new activity, then select **Done** .
5. (Optional) Change when the activity starts or ends.
6. (Optional) Add **Notes** for this activity.
7. Indicate the account or contacts associated with this activity.

   The main activity partner is on top. The choices you see here depend on the choices in the SAP system. Tap and drag the Reorder indicator to move a partner to a different position.

Option	Description
Activity Partner	Select one or more accounts as the activity partner.
Contact Person	Select one or more contacts.
Attendee	Select one or more accounts to include with this activity.
Owner	Select one more more contacts.

8. Tap **Done**.

Next

You can change the activity status, from the default **Open**, once it is saved on the SAP system.

See also

- *Searching and Viewing Activities* on page 33
- *Adding an Existing Activity to Account or Contact* on page 35
- *Logging a Phone Call as an Activity* on page 35
- *Logging an E-mail as an Activity* on page 36

Adding an Existing Activity to Account or Contact

Add an existing activity to an account or contact, or both.

1. On the home screen, select **Activities**.
2. Highlight the activity to edit.
3. In the **Activity** screen, click **Edit**.
4. Modify existing information, or add new activity partners, contacts, owner, or attendees.

   The main activity partner is on top. Tap and drag the  Reorder indicator to move a partner to a different position.
5. Tap **Done**.

See also

- *Searching and Viewing Activities* on page 33
- *Adding a New Activity for Account or Contact* on page 34
- *Logging a Phone Call as an Activity* on page 35
- *Logging an E-mail as an Activity* on page 36

Logging a Phone Call as an Activity

Log an incoming or outgoing phone call as a Mobile Sales activity.

1. On the home screen, select **Activities**.
2. Tap  Add New Activity.
3. In the **New Activity** screen, select **Incoming Call** or **Outgoing Phone Call**, then **Next**.
4. Add a **Description** for the new activity, then select **Done**.
5. (Optional) Change when the activity starts or ends.
6. Indicate the account or contacts associated with this activity.
7. Tap **Done**.

Next

You can change the activity status, from the default **Open**, once it is saved on the SAP system.

See also

- *Searching and Viewing Activities* on page 33
- *Adding a New Activity for Account or Contact* on page 34
- *Adding an Existing Activity to Account or Contact* on page 35
- *Logging an E-mail as an Activity* on page 36
- *Calling the Account Phone Number* on page 22
- *Calling a Contact* on page 29

Logging an E-mail as an Activity

Log an incoming or outgoing e-mail as a Mobile Sales activity.

1. On the home screen, select **Activities**.
2. Tap  Add New Activity.
3. In the **New Activity** screen, select **Incoming E-Mail** or **Outgoing E-Mail**, then **Next** .
4. Add a **Description** for the new activity, then select **Done** .
5. (Optional) Change when the activity starts or ends.
6. Indicate the account or contacts associated with this activity.
7. Tap **Done**.

By default, the activity status is Complete.

Next

You can change the activity status, from the default **Open**, once it is saved on the SAP system.

See also

- *Searching and Viewing Activities* on page 33
- *Adding a New Activity for Account or Contact* on page 34
- *Adding an Existing Activity to Account or Contact* on page 35
- *Logging a Phone Call as an Activity* on page 35
- *E-mailing an Account* on page 22
- *E-mailing a Contact* on page 30

Updating an Activity

Edit the details for an activity.

1. On the home screen, select **Activities**.
2. Tap the activity, then tap **Edit**.
3. Make the appropriate changes.
4. Select **Done**.

CHAPTER 5 Lead Management

Manage your leads to determine their potential to become opportunities.

You can view existing leads and add or edit notes for the lead.

See also

- *Chapter 2, Account Management* on page 17
- *Chapter 3, Contacts Management* on page 25
- *Chapter 4, Activity Management* on page 33
- *Chapter 6, Opportunity Management* on page 41
- *Chapter 7, Analytics* on page 43

Searching and Viewing Leads

Search to find a lead.

To find a lead quickly, you can use a text string to narrow the list of leads.

1. On the home screen, select **Leads**.
2. View or search leads.

To	Do this
View recent leads	Tap **Recent**. The Recent Leads screen lists the leads fact sheets you recently viewed, with the most recent on top.
Search activities	Tap the Search box. Enter a text string to narrow the results, or select on which fields you want to search: **All**, **Description**, or **Status**.

3. Select the lead to view.

See also

- *Updating Lead Details* on page 39

Updating Lead Details

Update lead details, such as description, status, start and end dates, and notes.

You cannot update leads with pending changes.

1. On the home screen, select **Leads**.
2. Select a lead to view the lead fact sheet.
3. Select **Edit**.
4. Enter information in the fields you want to update.
5. Tap **Done**.

The lead has pending changes until the device data is synchronized with the SAP system. If the SAP system rejects the changes, you receive a warning message. You must fix or undo the changes.

See also

- *Searching and Viewing Leads* on page 39

Creating or Editing a Note for a Lead

Create or edit a note for a lead.

1. On the home screen, select **Leads**.
2. Select a lead to view its fact sheet.
3. Scroll down and tap **Notes**.
4. In the Notes box, add or edit text.
5. Tap **Done**.

CHAPTER 6 Opportunity Management

Manage your Sybase Mobile Sales for SAP CRM opportunities. You can search, modify, and view opportunities, and associate accounts, contacts, and potential orders and sales with an opportunity.

See also

- *Chapter 2, Account Management* on page 17
- *Chapter 3, Contacts Management* on page 25
- *Chapter 4, Activity Management* on page 33
- *Chapter 5, Lead Management* on page 39
- *Chapter 7, Analytics* on page 43

Searching and Viewing Opportunities

Search to find an opportunity.
On the home screen, select **Opportunities**.

To	Do this
Search opportunities	By default, the search includes **All** opportunities. Tap the Search box, then enter a text string to narrow the results. You can also search on the **Description** or **Status** fields.
View recently added opportunities	Select **Recent**. The Recent Opportunities screen lists the opportunity fact sheets you recently viewed, with the most recent on top.
View current opportunities	Select **Current**.
View opportunity details	Select the opportunity. Tap a field to drill down to the account and contact details.

See also

- *Updating Opportunity Details* on page 42

Updating Opportunity Details

Updating opportunity details, such as description, status, start and end dates, and notes.

You cannot update opportunities with pending changes.

1. On the home screen, select **Opportunities**.
2. Select an opportunity to view opportunity details.
3. Select **Edit**.
4. Click a field to update its information.
5. Update the information.
6. Tap **Done**.

The opportunity has pending changes until the device data is synchronized with the SAP system. If the SAP system rejects the changes, you receive a warning message. You must fix or undo the changes.

See also

- *Searching and Viewing Opportunities* on page 41

CHAPTER 7 Analytics

View reports based on realtime information. You must have network connectivity to view reports.

See also

- *Chapter 2, Account Management* on page 17
- *Chapter 3, Contacts Management* on page 25
- *Chapter 4, Activity Management* on page 33
- *Chapter 5, Lead Management* on page 39
- *Chapter 6, Opportunity Management* on page 41

Report Types

The Sybase Mobile Sales for SAP CRM includes predefined reports.

You can toggle between the  graph view or  table view by selecting the appropriate icon at the top of the report.

Report type	Description
Pipeline Analysis	Displays the opportunities in the pipeline.
Top Opportunities	Displays the top opportunities in the pipeline based on expected sales volume.
Top Risk Opportunities	Displays the opportunities at risk in the pipeline.

See also

- *Viewing Reports and Editing Report Criteria* on page 43

Viewing Reports and Editing Report Criteria

View the available reports, and change the report criteria. You must have network connectivity to view reports.

You can click the Refresh icon to update the report with current data. Click the List View icon to display a text representation of the report.

1. On the home screen, select **Analytics**.
2. Select the report you wish to view or modify.
3. (Optional) Select **Edit** to change the report criteria, then
   a) Select a field to change the information.
   b) Save the changes.

See also

- *Report Types* on page 43

Creating a Pipeline Report

Create a pipeline report.

1. On the home screen, select **Analytics**.
2. Tap **Pipeline Analysis**, then tap **Edit**.
3. Indicate the report details.

Table 13. Pipeline report details

Option	Description
Period	Select the period: **Monthly** or **Quarterly**.
Weighting	Weights the opportunities based on their chance of success. Select **On** or **Off**.
User Position	If the position you choose is a sales manager position, the next two fields appear.
Sales Teams	If you are a manager and you chose a sales manager for **User Position**, you can indicate the sales teams.
Sales Representative	If you are a manager and you chose a sales manager for **User Position**, you can indicate the sales representatives.

4. Tap **Save** to save these options as the default report, or **Save As** to save the report to a new name.

   If you save the report to a new name, you can access the report in **My Reports**.

Creating a Top Opportunities Report

Create an opportunity report.

1. On the home screen, select **Analytics**.
2. Tap **Top Opportunities**, then tap **Edit**.
3. Indicate the report details.

Table 14. Top Opportunity report details

Option	Description
Status	Select the sales order status.
Number of Opportunities	Select number of opportunities to display.
Sort By	Select **Closing Date** or **Expected Sales Volume**.
Sort Order	Select **Ascending** or **Descending**.
Sales Representative	If you are a manager, you can indicate a sales representative or all representatives.
Closing Date	Indicates the cut-off date for the opportunities to qualify for the report. Select a date on the calendar, or **None**. If you select a closing date, Period and Time Frame disappear.
Period	Select the period: **None**, **Next**, **Current**, or **Previous**.
Time Frame	Select the time frame: **Monthly**, **Quarterly**, or **None**.

4. Tap **Save** to save these options as the default report, or **Save As** to save the report to a new name.

   If you save the report to a new name, you can access the report in **My Reports**.

Creating a Top Risk Opportunities Report

Create a risk opportunity report.

1. On the home screen, select **Analytics**.
2. Tap **Top Risk Opportunities**, then tap **Edit**.
3. Indicate the report details.

Table 15. Top Risk Opportunity report details

Option	Description
Sales Stage	Select the sales stage.
Time Frame	Select the time frame: **Last 7 Days**, **Last 30 Days**, or **Last 90 Days**.
Number Of Opportunities	Select number of opportunities to display.
Sort Order	Select **Revenue**, **Sales Stage**, or **Closing Date**.
Sales Representative	If you are a manager, you can indicate a sales representative or all representatives.

4. Tap **Save** to save these options as the default report, or **Save As** to save the report to a new name.

If you save the report to a new name, you can access the report in **My Reports**.

CHAPTER 8 Uninstalling the Mobile Sales Application

If needed, you can uninstall the Sybase Mobile Sales for SAP CRM application from your device. Uninstalling removes the application and all Mobile Sales data from the device.

Prerequisites

Uninstall the previous version of the Mobile Sales application before installing a newer version. If applicable, delete the application in your iTunes account.

1. Unsubscribe from the SAP system.
   a) From the application home screen, select **Settings > General**.
   b) Tap **Connection Information**.
   c) Tap **Unsubscribe**.
2. On the iPhone home screen, hold your finger on the Sybase application icon until it begins to shake or wiggle.
3. Tap the **X** in the upper left-hand corner of the application icon.

See also

- *Supported Devices* on page 3
- *Installation Prerequisites* on page 3
- *Installing Mobile Sales on Your iPhone Device* on page 4
- *Chapter 9, Troubleshooting* on page 49

CHAPTER 9 Troubleshooting

Determine the cause of problems and apply the recommended solution.

Phone Number Extensions Not Synchronized With Personal Contacts

Issue: If your organization configured the application to synchronize Mobile Sales and personal (native) contacts, phone number extensions do not appear in personal contacts.

Workaround: None.

Last Edits Overwrite Pending Changes

Issue: If more than one person is editing the same record at the same time, and that information has not been sent to the SAP system, the information associated with the last save operation overwrites any pending modifications.

Workaround: None.

Cannot View Full Screen for Top Opportunities Report

Issue: If the prospect name is too long, you might not be able to see the full screen in the Top Opportunties report.

Workaround: Zoom out until you can see the entire report.

Initial Data Synchronization Fails If Not Enough Device Storage Space

Issue: When you first try to log into the SAP system, and you do not have enough storage space for the Mobile Sales data, an error message appears.

Workaround: Unsubscribe from the device. Ask your system administrator to clear the queue for that subscription, then log in again.

Reports Do Not Show Edit Button in Landscape Mode

Issue: When you select a report type, and view it in landscape mode, the Edit button disappears.

Workaround: To edit the report, return to portrait mode.

Activities From SAP System Show Empty Dates

Issue: When your company configured the SAP system, it indicated which date type can flow to the device. All other date types are blank on the device.

Workaround: None.

Country Code For Phone Number Does Not Flow to Device

Issue: Although the country code for a phone number appears in the SAP system, it does not flow to the device.

Workaround: None.

Expected/Won Is Not Visible in Pipeline Analysis Report

Issue: Expected/Won is not visible in Pipeline Analysis report if ratio is too small.

Workaround: None.

Mobile Sales Objects Reflect SAP Server Time Zone

Issue: Any objects created in the SAP system or on your device are saved using the time zone in which the SAP server resides.

Workaround: None.

No Report Data Appears (Analytics)

Issue: When you try to view a report, you see an error message and the report does not display.

Workaround:

Issue	Workaround
The system may not have enough appropriate data to display the report	Try again later when more data is available.
The user position is not set properly for Pipeline Analysis report	Indicate the user position. Mobile Sales displays the report criteria screen.
You receive a warning that your device is offline when trying to view a report	Make sure you device is online and you are connected to the SAP system.
No Sales Prospect in Top Opportunity report	SAP system data does not contain a Sales Prospect. Be sure to define a Sales Prospect when creating an opportunity.

AM and PM Toggle When Entering Hour

Issue: If you manually enter one digit for the hour, the AM and PM values toggle.

Workaround: Enter two digits for the hour, for example, "01" instead of just "1."

Reopened Opportunies Remain at 100 Percent

Issue: If an opportunity is closed and then reopened, its Chance of Success remains at 100 percent in the SAP system.

Workaround: None.

Device Data and SAP System Data Do Not Always Match

Issue: Data on your device and data in the SAP system (WebUI) do not always match. Your organization may decide to send a subset of the data to your device, and some objects might have different names in the two systems. Also, your organization might customize your Mobile Sales data on the SAP system.

Workaround: None.

See also

- *Supported Devices* on page 3
- *Installation Prerequisites* on page 3
- *Installing Mobile Sales on Your iPhone Device* on page 4
- *Chapter 8, Uninstalling the Mobile Sales Application* on page 47

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