Device Users Guide

Sybase Mobile Sales for SAP CRM 1.2

iOS

DOCUMENT ID: DC01177-01-0120-01
LAST REVISED: December 2010

Contents

CHAPTER 1 Sybase Mobile Sales for SAP CRM

Sybase® Mobile Sales for SAP® CRM (Mobile Sales) provides anywhere, anytime access to SAP® Customer Relationship Management software from your smartphone. Whether at a customer site or in an airplane, you will always have quick and reliable access to your CRM data from your mobile device to maximize your productivity and effectiveness.

Mobile Sales gives you full access to the specific SAP CRM data you need: accounts, contacts, leads, opportunities, activities, and analytics. 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:

- Manage accounts and contacts – quickly access all information necessary to manage sales accounts from a single, comprehensive view. Capture and track critical information about prospects, customers, and partners.
- Manage leads and opportunities – track and qualify leads. New leads and opportunities appear instantly as they are assigned in the SAP CRM system.
- Manage your sales activities – quickly access, create, and modify planned activities within the Mobile Sales application or the native calendar.
- View all information necessary to manage your sales accounts.
- View and monitor the status and progress of your interactions.
- Inspect sales documents – access current information to gain a comprehensive view of customers prior to a visit and to accurately position new products and offerings.
- Access real-time reports – review charts and key reports to prioritize actions to achieve sales objectives in the most efficient manner.

Device Requirements

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

Supported Devices

- Apple iPad
- Apple iPhone 4
- Apple iPhone 3GS
- Apple iPhone 3G
- Apple iPod touch 3G

Note: For better performance on iPhone devices, Sybase recommends using an Apple iPhone 3GS or Apple iPhone 4 device.

Device Storage Requirements

Verify that your smartphone has adequate device storage space.

Mobile Sales requires 25 MB free storage space for the out-of-the-box (non-customized) application.

Supported Languages

Mobile Sales labels and messages appear in several supported languages.

- English
- French
- German
- Spanish

Live Mode

If your device is set to a supported language, Mobile Sales labels and messages automatically appear in that language. If your device is set to an unsupported language, you can select the Mobile Sales display language during login.

Demo Mode

If you are running Mobile Sales in Demo mode, the Mobile Sales data displays in English, while application labels appear in the selected supported language.

SAP System Messages

SAP system messages appear in the language defined for the SAP system. If the SAP system is set up for English, warning messages and field names appear in English, for example, when creating or updating an account, contact, or activity, or viewing and editing Analytics report options.

Installation Prerequisites

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

- Delete any existing version of Mobile Sales.
- See *Device Requirements* for information on supported devices and storage space requirements.
- (Skip this step if you plan to run Mobile Sales in Demo mode.) See your system administrator to obtain your SAP account and Sybase Unwired Platform connection information.

Note your user name, Unwired Server or Relay Server name, Unwired Server or Relay Server port number, activation code, and farm ID. Enter the connection information in Sybase Settings before starting the Mobile Sales application.

CHAPTER 2 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.

Note: If you have an existing version of Mobile Sales on your device, delete it before installing a newer version.

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

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

Installing Mobile Sales from App Store

Install Sybase Mobile Sales for SAP CRM from the App Store, as directed by your system administrator.

Prerequisites

Review the installation prerequisites.

Task

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

Next

- If you are running Mobile Sales in Live mode, start the application, tap **Setup Connection**, then specify the connection settings in **Settings > Sybase**.
- If you are evaluating the Mobile Sales application, run it in Demo mode, which contains sample data. You need not connect to the SAP system.

- (Optional) If instructed by your system administrator, enable notifications on your device. From the home screen, select **Settings > Sybase**, then turn on **Notifications**.

Installing Mobile Sales Using iTunes

Install Sybase Mobile Sales for SAP CRM using iTunes.

Prerequisites

Review the installation prerequisites.

Task

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

Next

- If you are running Mobile Sales in Live mode, start the application, tap **Setup Connection**, then specify the connection settings in **Settings > Sybase**.
- If you are evaluating the Mobile Sales application, run it in Demo mode, which contains sample data. You need not connect to the SAP system.
- (Optional) If instructed by your system administrator, enable notifications on your device. From the home screen, select **Settings > Sybase**, then turn on **Notifications**.

CHAPTER 3 Connection Settings

View or change the connection and global application settings for the Sybase Mobile Sales for SAP CRM application. Enter these settings before starting the application.

Enter Sybase Settings

Note: Connection settings do not need to be set if you are running Mobile Sales in Demo mode.

Sybase Settings let you indicate connection information to Unwired Server or Sybase Relay Server. Obtain this information from your system administrator and enter it before launching the application.

Tap **Settings** > **Sybase**.

Table 1. Connection Information

Option	Description
Server Name	Host name or IP address of Relay Server or Unwired Server.
Server Port	Port number for Relay Server or Unwired Server.
Farm ID	Relay Server farm ID for the Unwired Server installation.
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 user registration.
URL Prefix	(Optional) If your company is using a Relay Server with a custom configuration, enter the Relay-Server-specific URL.

Table 2. Sybase Features

Option	Description
Mobile Sales	Enables the Mobile Sales application. The default is **ON**.

Option	Description
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 is **OFF**, the Sybase Mobile Workflow launches as a stand-alone application.

Table 3. General

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

Verify Connection to Server

The Sybase Settings log indicates if you are successfully connected to the server.

To view the log:

Start Mobile Sales, then tap **Settings > General > Connection Information** to see if the connection is active.

See also

- *Chapter 4, Starting Sybase Mobile Sales* on page 9

CHAPTER 4 Starting Sybase Mobile Sales

Once you install the Sybase Mobile Sales for SAP CRM application on your device and connect to the SAP system, you can start the application.

Prerequisites

Note: If you plan to run Mobile Sales in Demo mode for evaluation purposes, skip these instructions and refer to *Running Mobile Sales in Demo Mode*.

- Install Mobile Sales.
- Enter Sybase Settings connection information.
- Before starting Mobile Sales and logging in for the first time, shut down any programs or applications running on the device.

Task

1. Scroll to the page that contains the **Sybase** icon; then tap the icon to launch the application.
   - Tap **Setup Connection** to enter Unwired Server or Relay Server connection information. Tap **OK** to acknowledge the message indicating that you enter the connection information from the Sybase page in the Settings application. From the home screen, select **Settings > Sybase**. Enter the connection information, then restart the application.

     Note: If switching from Demo mode to Live mode, you must tap **Setup Connection** before entering connection information in Sybase Settings.
   - 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 workflow functionality. See *Sybase Mobile Workflow for SAP Business Suite Device User Guide for iOS*.
2. Enter your Mobile Sales personal identification number (PIN).

   Choose the number that you need to enter to start the Mobile Sales application. This PIN is a security measure to safeguard your company's CRM data. The PIN must be at least 4 digits.
   - (First time/reinstallation) Create a PIN in the **Password** field, then verify it in the second field.
   - (Second or subsequent logins) Enter the PIN in the **Password** field. Select **Change Password** to change the PIN. You can change the PIN once you enter the current PIN.

   If you forget your PIN and do not enter the correct PIN after nine attempts, the Mobile Sales data is deleted from your device. To access the Mobile Sales application and your

SAP CRM data, start the Mobile Sales application again, then create a new PIN. Proceed to the next step to create a new subscription to the SAP system.

3. Enter the SAP account and password.
4. (Optional) Select **Language** to subscribe to Mobile Sales data in a language different than the one set on the device.
5. Select **Continue** to complete the login process.

The Mobile Sales application begins synchronizing data with the SAP system. It can take up to 30 minutes or longer to perform the initial synchronization with the SAP system, depending on the data set size for your subscription. For best results, and to avoid reduced performance, wait until the initial data download is complete before starting or using the Mobile Sales application.

If you do not see data downloading from the SAP server, view the Sybase Settings log to verify your connection information is correct and that you are connected to the SAP system.

Once you start the Mobile Sales application, it is always online and connected to the SAP server. To use the Mobile Sales application offline, turn on Airplane Mode.

See also

- *Running Mobile Sales in Demo Mode* on page 10
- *Switching from Demo Mode to Live Mode* on page 11
- *Chapter 3, Connection Settings* on page 7

Running Mobile Sales in Demo Mode

You can run Mobile Sales in Demo mode for evaluation purposes. To run in Demo mode, you need not be online or connected to the SAP system.

When you run in Demo mode, Mobile Sales creates test data. If you update any existing data or create new data, those changes are marked as pending. In Demo mode, the Mobile Sales data appears in English while the application labels and messages appear in the selected supported language.

1. (iPad users) Determine whether you want to view the Mobile Sales application in portrait or landscape view.

   Tip: Due to a limitation of Demo mode, switching from portrait view to landscape view from the Welcome page produces undesirable results.

2. Scroll to the page that contains the **Sybase** icon; then tap the icon to launch the application.
3. Tap **Demo Application**.

See also

- *Chapter 4, Starting Sybase Mobile Sales* on page 9

• *Switching from Demo Mode to Live Mode* on page 11

Switching from Demo Mode to Live Mode

Once you are finished evaluating Mobile Sales in Demo mode, you can switch to Live mode to run the application and download data from the SAP system.

1. If you are currently running the Mobile Sales application in Demo mode, exit the application.
2. Start the Mobile Sales application.
3. Tap **Setup Connection**, then **OK** to exit the Mobile Sales application.
4. Tap **Settings > Sybase**, then enter the connection information.
5. Restart Sybase Mobile Sales, then indicate a Mobile Sales PIN.
6. Log in using your SAP user ID and password.

See also

• *Chapter 4, Starting Sybase Mobile Sales* on page 9
• *Running Mobile Sales in Demo Mode* on page 10

CHAPTER 5 Getting Started with Mobile Sales

Learn about the home screen, how the Mobile Sales application synchronizes with the SAP system, how to change application settings, and where to view important messages (notifications) from the SAP CRM system.

- Some of the functionality of the Mobile Sales application is determined by the locale and language of where the SAP system resides.
- Numeric format on your device does not change based on locale. Numbers are always displayed using the format defined by the locale of the SAP system.
- Some device messages appear in the SAP system language rather than the device language.
- On the iPhone, if you change any Settings, the data on some screens might not refresh until the screen is reloaded.

How you position your Apple mobile device determines what you see on your screen:

Device	Position	Description
iPhone or iPod Touch	Vertical	Displays all buttons and options.
iPhone or iPod Touch	Horizontal	Provides more screen real estate. Some buttons do not display to accommodate the larger display area.
iPad	Vertical	Displays all buttons and options. Displays one Mobile Sales screen at a time. When navigating in the application, the parent screen overlaps the list or detail views.
iPad	Horizontal (recommended)	Displays the Mobile Sales application in master-detail mode, where the parent screen appears on the left, and the child screen appears on the right. Some navigational buttons do not display because the parent and child screens are side-by-side.

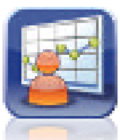
Mobile Sales Home Screen

Access main features of the application on the Mobile Sales home screen.

Home Screen Icons

You can turn on or turn off components in Mobile Sales Settings.

Table 4. Mobile Sales Home Screen Icons

Mobile Sales icon	Description
	Accounts. Displays a list of your Mobile Sales accounts.
	Contacts. Displays a list of your Mobile Sales contacts.
	Activities. Displays a list of all your Mobile Sales activities.
	Leads. Displays a list of your Mobile Sales leads.
	Opportunities. Displays a list of your Mobile Sales opportunities.
	Sales Orders. Displays a list of your sales orders.

If your organization has added more facets or icons to the home screen, you can scroll to see them.

Today's Activities

Today's Activities lists all activities for today. Select an activity from this view to view its fact sheet. To view today's activities, turn on **Today's Activities** in Mobile Sales **Settings** > **Home Page**. By default, this feature is turned off.

On the iPad, if there are no activities for today or this feature is turned off, Mobile Sales displays Most Recent items on the detail screen, by default. You can change the default Detail View Items to display **Notifications** in Home Page settings.

Most Recent
In the Tab bar, tap **Most Recent** to display the recently viewed items for accounts, contacts, activities, leads, and opportunities. Use Mobile Sales **Settings > Recent Items** to change how many recent items appear for each object.

Notifications
In the Tab bar, tap **Notifications** in the tab bar to display a list of your Mobile Sales notifications. You can tap a notification to view or edit the details.

Settings/More
In the Tab bar, tap **Settings** to view or modify Mobile Sales settings. If you turned on Sybase Mobile Workflow in Sybase Connection Settings, the Tab bar displays More, where you can access Mobile Sales Settings and Workflow.

Getting Back Home
In the Tab bar, tap **Home** at any time to return to the Mobile Sales home screen.

Analytics
In the Tab bar, tap **Analytics** to display a list of the reports you can run to view real-time sales data from the SAP system.

Mobile Sales Version
In the Tab bar, tap **Settings** > **General** > **About**.

See also

- *Notifications* on page 18

Data Status Indicators

When creating or editing CRM information (objects), the application displays icons to indicate important information.

For each opportunity, the SAP server calculates the chance of success and shows an icon indicating the chance-of-success percentage.

When you create a new object or modify an existing one, the changes 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 only in the device database. The SAP server replies in one of three ways:

- Accepts the changes. The pending icon disappears.

- The pending icon changes to a yellow triangle. You can ignore (remove warning) or manually fix the issues.
- The pending icon changes to the red error icon. You must fix or undo the changes.

If multiple users simultaneously update a record, the most recent valid change is updated on the SAP system.

Table 5. Data Status Icons

Icon	Description
	Pending changes. If you are 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. You cannot edit an object with pending changes.
	Yellow triangle indicator – warning messages associated with the data. You can ignore the messages or manually 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**. 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. **Note:** If a contact contains warning messages, the warning messages also appear on the account associated with the contact and all contacts associated with that account.
	Red error icon – the 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 in which to enter your correct password. After you enter the correct login information, you must manually edit the affected record again and save it.

Mobile Sales 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 you create new or update existing information, the information is synchronized with the SAP server. Once connected to the server, data is refreshed automatically.

Unsubscribing from Mobile Sales

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

For example, you need to unsubscribe from your device before you can log in 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:

- Do not make any changes to your connection information in Sybase Settings, or the unsubscribe fails and you will need to contact your system administrator to delete your subscription.
- You must have network connectivity. If you are offline when you unsubscribe, the unsubscription 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. Confirm that you want to unsubscribe.

Changing Your Password

Change the password to access the Sybase Mobile Sales for SAP CRM application.

Prerequisites

Ask your system administrator to change your password in the SAP system before you change it on the device.

Task

1. From the Mobile Sales home screen, tap **Settings > General > Change Password**.
2. Enter the old and new passwords, then confirm the new password.

The SAP system validates the password.

Notifications

Shows all new activities, leads, and opportunities that are assigned to you. Notifications also show login failure (invalid credential) messages during login to or synchronization with the SAP server for any updates, new object creations, or new queries for reports.

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

See also

- *Mobile Sales Home Screen* on page 14

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 and is connected to the SAP system.

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

See also

- *Deleting and Clearing Notifications* on page 18
- *Resetting Your Password in Notifications* on page 19

Deleting and Clearing Notifications

Delete an individual notification, or clear all notifications.

1. From the home screen, select **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 18
- *Resetting Your Password in Notifications* on page 19

Resetting Your Password in Notifications

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

1. From the home screen, select **Notifications**.
2. Find the notification that indicates the login failure, then select it to display its details.
3. Tap **Reset** to change your password.

See also

- *Viewing Notifications* on page 18
- *Deleting and Clearing Notifications* on page 18

Personalization and Settings

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

Before you can change settings, you must complete 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.

Note: On the iPhone, if you change any Settings, the data on some screens might not refresh until the screen is reloaded.

General Settings

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

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

Table 6. 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 used to access the SAP server. Check with your system administrator before changing this password.

Option	Description
Geocoder 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.
Geocoder Server	(Optional) Enter the NAVTEQ server name.
Log Level Settings	Log Level settings indicate the depth of detail to capture in the error log. Debug provides the most comprehensive logging information. • 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

- *Chapter 7, Maps* on page 27

Home Page Settings

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

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

Table 7. 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.
Status	Indicates whether to display the activity status.
(iPad only) Detail View Items	Determines what to display when there are no today's activities: Most Recent (default) or Notifications.

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 to display for accounts, contacts, activities, leads, and opportunities, as well as how many items to display for **Most Recent** in the tab bar. Tap **Settings** > **Recent Items**.

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**.

Table 8. 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.

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**.

Table 9. 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 all personal contacts in the Mobile Sales 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.

Table 10. Contact Details Settings

Option	Description
Address & Communication Info	Indicates whether to display Address & Communication information (alternate contact information) after the work address in the fact sheet. The default is OFF. If OFF, you can tap **Address & Communication Info** in the fact sheet to view it.

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**.

Table 11. Activities Settings

Option	Description
Activities	Indicates whether to disable this facet.
Status	Indicates whether to display activity status in the Activities list.

Option	Description
Date	Indicates whether to display the activity date range in the Activities list.
Time	Indicates whether to display the activity times associated with the data range in the Activities list.

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**.

Table 12. Leads Settings

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

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**.

Table 13. Opportunities Settings

Option	Description
Opportunities	Indicates whether to disable this facet.
Chance of Success	Indicates whether to display the chance of success information for the opportunity in the Opportunities list.

Option	Description
Status	Indicates whether to display the status for the opportunity in the Opportunities list.
Account Name	Indicates whether to display the associated account name for the opportunity in the Opportunities list.
Start Date	Indicates whether to display the start date for the opportunity in the Opportunities list.
Closing Date	Indicates whether to display the closing date for the opportunity in the Opportunities list.
Sales Stage	Indicates whether to display the sales stage for the opportunity in the Opportunities list.

Analytics Settings

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

Analytics settings enable you turn on or turn off the Analytics facet and the Dashboard view for reports. Tap **Settings > Analytics**.

Table 14. Analytics Settings

Option	Description
Dashboard View	**ON** by default. The report dashboard displays report data in three formats, depending on the report type. If the dashboard is **OFF**, report data shows in only one format, depending on the report type: bar chart or column chart.

Sales Orders Settings

View or change Sales Order settings for the Sybase Mobile Sales for CRM application.

Sales Orders settings enable you to turn on or turn off the Sales Orders facet. Tap **Settings > Sales Orders**.

CHAPTER 6 Searching

Sybase Mobile Sales for SAP CRM enables you to perform different searches so you can quickly find the data you need.

Search type	Description
Search box	Search your device data for a record in a list. Enter a text string to filter the results you see. You see results for any field in the list. You can further narrow the search parameters by selecting an option under or by the Search box. **Note:** If using an iPad: • In horizontal mode, the search options appear only on the right panel. • If you perform a search, then flip the device, the application orientation does not change.
Global Recent Items	From the home screen, select **Most Recent** to quickly access recently viewed items.

CHAPTER 7 Maps

Mobile Sales supports different map options for your smartphone.

For iPhone, the default map provider is Google Maps mapping service, where you can view an account or a contact address on a map, obtain driving directions to an account or a contact, and use all the features that Google Maps provides. When you launch Google Maps from within the Mobile Sales application, you exit the application and must restart it to continue.

Another choice is NAVTEQ digital map service, which integrates with Mobile Sales. NAVTEQ enables you to view an address on a map for a Mobile Sales account or a contact, or find all accounts or contacts near your current location, without leaving the Mobile Sales application. Your company must purchase the service directly from NAVTEQ. You indicate the NAVTEQ Geocoder key and Geocoder server in Mobile Sales General Settings.

See also

- *General Settings* on page 19

Viewing an Address on a Map

View the address for an account or a contact on a map.

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

   The map appears within the Mobile Sales application (NAVTEQ service), or launches a browser and displays the location (Google Maps).
4. (Optional) Double-tap to zoom in.

See also

- *Displaying Driving Directions to Account or Contact* on page 27

Displaying Driving Directions to Account or Contact

You can obtain driving directions to an account or a contact.

1. On the home screen, select **Accounts** or **Contacts**.
2. Select the account or contact to view its fact sheet.

3. Tap the address to see the location on a map.

   The map appears within the Mobile Sales application (NAVTEQ service), or launches a browser and displays the location (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 Address on a Map* on page 27

CHAPTER 8 Account Management

You can quickly access all information necessary to manage sales accounts from a single, comprehensive view.

With Mobile Sales Account Management, you can:

- Search, modify, and view accounts, as well as the activities, leads, opportunities, and relationships associated with an account.
- View sales documents associated with the account.
- Create new accounts.
- Update account information.
- View the account address on a map.
- Quickly communicate with an account from the account fact sheet.
- Capture, monitor, and track critical information about prospects, customers, and partners.

View Accounts

View the complete list of CRM accounts.

When you select **Accounts** from the Mobile Sales home screen, your CRM accounts appear. From the list screen, you can:

- Narrow the list results.

  Enter a text string in the **Search** box. You can further narrow the search parameters by selecting **Name**, **City**, or **State**.
- Display a list of recently viewed accounts.
- Select an account to view its fact sheet.

Create an Account

Create a Mobile Sales account. Mobile Sales synchronizes the information with the SAP system.

You can create corporate or individual accounts, then associate contacts, activities, lead, and opportunities with the account.

When creating an account:

- The only required fields when creating an account is Name for corporate accounts, and First Name and Last Name for individual accounts.

- Although the Country field is optional, when creating an account, select a country. If you do not indicate a country, any updates to contacts associated with the account do not get synchronized with the SAP system.
- Be sure to indicate the state/region using the two-digit postal code in capital letters to match how states/regions are entered in the SAP system. For example, for California, enter `CA`.

See also

- *Data Status Indicators* on page 15

Inspect Account Details

View an account fact sheet, which displays account details.

Your cursor position on the Account fact sheet determines which actions you can perform, for example, you must select the account address before you can view it on a map.

For e-mail addresses, postal addresses, phone numbers, and Web sites, you can tap the field to quickly launch the associated native application.

From the account fact sheet, you can:

- View account details and contact an account.
  - View the account address on a map.
  - Call or send an e-mail message to the account.
- View the account's Web site.
- View interactions for the account.
- View relationships for the account.
- View sales documents associated with the account.
- Create activities, leads, or opportunities for the account.
- View account notes.
- Edit account information.

Edit Account Details

You can edit the details for an account.

Once you display the account fact sheet, tap **Edit**.

From the Edit Account screen, you can:

- Modify address and contact information.
- Add or edit the notes associated with the account.
- Add new contact relationships or delete existing ones.

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

CHAPTER 9 Contacts Management

Manage your Sybase Mobile Sales for SAP CRM contacts.

With Mobile Sales Contacts Management, you can:

- Search, modify, and view contacts, as well as activities, leads, opportunities, and relationships associated with a contact.
- View sales documents associated with the contact.
- Update contact information.
- Create a new contact.
- Quickly communicate with your contact: send an e-mail message or place a call to the account main or mobile number, all from the contact fact sheet.

View Contacts

View the complete list of Mobile Sales contacts.

When you select **Contacts** from the Mobile Sales home screen, your CRM contacts appear. From the list screen, you can:

- Narrow the list results.

  Enter a text string in the **Search** box, or select on which fields you want to search: **All**, **First Name**, **Last Name**, or **Company**.
- Display a list of recently viewed contacts.
- Select a contact to view its fact sheet.

Create a Contact

Create a Mobile Sales contact. Mobile Sales synchronizes the information with the SAP system.

When creating a Mobile Sales contact:

- You can create a CRM contact or a personal contact.
- If creating a CRM contact, you must associate the contact with an existing account. If the contact is for a new account, create the account before creating the contact.
- Once the Mobile Sales contact is synchronized with the SAP system, you can add it to your native contacts list.

See also

- *Data Status Indicators* on page 15

Inspect Contact Details

View a contact fact sheet, which displays contact details.

Your cursor position on the Contact fact sheet determines which actions you can perform, for example, you must select the contact address before you can view it on a map.

Note: If a contact contains warning messages, the warning messages also appear on the account associated with the contact and all contacts associated with that account.

From the contact fact sheet, you can:

- View work address, personal address, and contact information.
  - View the address on a map.
  - Call or send an e-mail message.
  - Add a CRM contact as a personal contact in the native address book. To see this menu option, you must turn on the View Personal Contact setting in **Settings > Contacts**.
- View relationships, activities, leads, opportunities, or interactions for the contact.
- View sales documents associated with the contact.
- View contact notes.

Edit Contact Details

You can edit the details for a contact.

Once you display the contact fact sheet, select **Edit**.

From the Edit Contact screen, you can:

- Modify contact details.
- Add or edit the notes associated with the contact.

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 rejection or an error message. If the SAP system accepts the update or new object, you may receive a warning message if a minor data fix is required. Sybase recommends that you fix or undo the changes.

Note: If a contact contains warning messages, the warning messages also appear on the account associated with the contact and all contacts associated with that account.

CHAPTER 10 Activity Management

Manage your schedule and activities from your mobile device. All information is synchronized with the SAP CRM back end to ensure data consistency throughout the organization.

With Mobile Sales Activity Management, you can:

- Quickly access, create and modify planned activities.
- Increase visibility into customer interactions by creating activities for ingoing and outgoing e-mail messages and phone calls.
- Search, view, and create activities, as well as view or add accounts and contacts associated with an activity.

View Activities

View your Mobile Sales activities.

When you select **Activities** from the Mobile Sales home screen, all activities appear in the Activity list.From the list screen, you can:

- Narrow the list results.

  Enter a text string in the **Search** box, or select the fields on which to search: **Recent** or **Today**.
- Select an activity to view its fact sheet.
- Create a new activity.

Create an Activity

Create a Mobile Sales activity. Mobile Sales synchronizes the information with the SAP system.

When creating an activity:

- Select one of the predefined activity types. Your system administrator determines the activity type list.
- Enter an activity description. The activity start and end dates default to the current date and time.

See also

- *Data Status Indicators* on page 15

Inspect Activity Details

View the activity fact sheet.

From the fact sheet, you can:

- View the user-specified activity description/name, activity type, activity status, and start and end dates.
- View related information, such as account name, main contacts, responsible persons, sales representatives, sales managers, and more.
- Drill down to view the fact sheet for a related account or contact.
- View the notes associated with the activity.

Edit Activity Details

Edit an activity's details.

Once you display the fact sheet, tap **Edit**.

From the Edit Activity screen, you can:

- Update basic details, such as activity description/name, status, and start and end dates.
- Add, update, or delete related information, such as accounts, contacts, persons responsible, attendees, and so on.
- Add or update the notes for this activity.

CHAPTER 11 Lead Management

Manage your leads to determine their potential to become opportunities. New leads appear instantly as they are assigned in the SAP CRM system.

With Mobile Sales Lead Management, you can:

- Stay current on leads and accelerate the sales cycle while away from your desk.
- Execute on the information and update the lead or capture new leads as they arise.
- Search, modify, and view leads, and associate accounts and contacts with a lead.
- View potential orders and sales items associated with a lead.
- Add new items to the lead.

View Leads

View your current, past, and future leads.

When you select **Leads** from the Mobile Sales home screen, Mobile Sales displays your current, past, and future leads. From the list screen, you can:

- Narrow the list results.

  Enter a text string in the **Search** box, or select the fields on which to search: **Title** or **Status**.
- Select a lead to view its fact sheet.
- View only recent or current leads.
- Create a new lead.

Create a Lead

Create a Mobile Sales lead. Mobile Sales synchronizes the information with the SAP system.

When creating a lead:

- You can associate the lead with existing account and contact information (related information). If you need to associate the lead with a new account or contact, create it before creating the lead.
- You can add or delete items associated with the lead.

See also

- *Data Status Indicators* on page 15

Inspect Lead Details

View the lead fact sheet to display lead details.

From the lead fact sheet, you can:

- View the start and closing dates, and sales stage.
- View related information, such as account name, main contacts, responsible persons, sales representatives, sales managers, and more.
- Drill down to view the fact sheet for a related prospect/account or contact.
- View notes for this lead.
- View line items for this lead.

Edit Lead Details

Edit the details for a lead.

Once you display the lead fact sheet, select **Edit**.

From the Edit Lead screen, you can:

- Add or update basic details, such as description, status, and start and end dates.
- Add, update, or delete contact and account relationship and partner information.
- Add or update the notes for this lead.
- View the items associated with this lead.
- Add new items or update existing items for this lead.

CHAPTER 12 Opportunity Management

New opportunities appear instantly as they are assigned in the SAP CRM system.

With Mobile Sales Opportunity Management, you can:

- Stay current on opportunities and accelerate the sales cycle while away from your desk.
- Execute on the information and update the opportunity, or capture new opportunities as they arise.
- Search, modify, and view opportunities, and associate accounts and contacts with an opportunity.
- View potential orders and sales (items) associated with an opportunity.

View Opportunities

View your past, current, and future opportunities.

When you select **Opportunities** from the Mobile Sales home screen, Mobile Sales displays your past, current, and future opportunities. From the list screen, you can:

- Narrow the list results.

  Enter a text string in the **Search** box, or select the fields on which to search: **All**, **Description**, or **Status**.
- Select an opportunity to view its fact sheet.
- View only recent or current opportunities.
- Create a new opportunity.

Create an Opportunity

Create a Mobile Sales opportunity. Mobile Sales synchronizes the information with the SAP system.

When creating an opportunity:

- You can associate the opportunity with existing account and contact information (related information). If you need to associate the opportunity with a new account or contact, create it before creating the opportunity.
- You can add or delete items associated with the opportunity.

See also

- *Data Status Indicators* on page 15

Inspect Opportunity Details

View the opportunity fact sheet, which displays opportunity details.

From the opportunity fact sheet, you can:

- View the chance of success, start and closing dates, potential sales revenue, sales stage, and status.
- View related information, such as account name, main contacts, responsible persons, sales representatives, sales managers, and more.
- Drill down to view the fact sheet for a related prospect/account or contact.
- View the notes associated with this opportunity.
- View line items for this opportunity.

Edit Opportunity Details

Edit the details for an opportunity.

Once you display the fact sheet, select **Edit**.

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

From the Edit Opportunity screen, you can:

- Add or update the basic opportunity details, such as description, sales stage, volume, status, and more.
- Add, update, or delete contact and account relationship and partner information.
- Add or update the notes for this opportunity.
- View the items associated with this opportunity.
- Add new items or update existing items for this opportunity.
- Clone the opportunity by saving it with another description.

CHAPTER 13 Sales Orders

View sales orders from the SAP CRM system.

When you select **Sales Orders** from the Mobile Sales home screen, your sales orders appear in the Sales Order list. From the list screen, you can:

- Narrow the list results.

  Enter a text string in the **Search** box, or select the fields on which to search: **Recent** or **Current**.
- Select a sales order to view its fact sheet.
- Drill down to view the fact sheet for the employee responsible.
- View the items associated with the sales order.
- View or edit the notes for this sales order.

CHAPTER 14 Analytics

Review charts and key reports, based on real-time information, to prioritize actions to achieve sales objectives in the most efficient manner.

You must have network connectivity to view reports. Mobile Sales includes several report types. The reports display the most current Mobile Sales data based on the default report criteria specified on the device for each report.

Note: In some of the reports, large sales volume values may display in scientific notation.

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

Report Display Formats

By default, reports appear in a dashboard, where you can view the data in text format or three graphical formats, which vary by report type. To view reports in a simple chart format, turn off the Dashboard option in Analytics settings.

Note: If viewing a report in landscape view, you must return to portrait view to navigate back to the previous screen. Sybase recommends using the navigation bar only in portrait view, where it occupies less screen real estate.

Select the Refresh button to get the latest report data. You can toggle between the graph view or table (text) view by selecting the appropriate icon at the top of the report. In text view, you can scroll to the bottom to view the report criteria. For column charts, bar graphs, and line charts, you can tap and hold a data point to view additional information.

Edit Report Criteria

You can change the report criteria, and save it as the default report or create a new report. If you save a report with a new name, it appears in My Reports.

Note: If you edit a report and the report data does not refresh, go back to the home screen, tap **Analytics**, then open the report.

Tap the report, tap **Edit**, change report options, select **Save As**, then enter a report name. The Edit button appears only in portrait mode.

Delete Saved Reports

You can delete any report from My Reports.

Tap the report, tap **Edit**, then select **Delete**.

Pipeline Report

Provides a real-time snapshot of expected or weighted revenue and revenue targets in your sales pipeline.

Select **Analytics** from the home screen, then select **Pipeline Analysis** to display this report with the default settings. You can edit the report options and save them as the default report, or save this report with a user-defined name in My Reports.

Mobile Sales determines the value for Difference using this calculation: Won + Expected – Target. If Difference is a negative value, it appears as 0 (zero) on the graph.

The report dashboard shows a bar chart (default), column chart, line chart, or text view of the pipeline data. Tap the thumbnail to display a different chart type as the main view, or zoom to view graph data.

Table 15. Pipeline Report Details

Option	Description
Period	Select the period: **Monthly** or **Quarterly**.
Weighting	Calculates weighted revenue based on the opportunities' chance of success.
User Position	Select your position. If you are a manager and have appropriate permissions, specify **Sales Manager** for the next two fields to appear.
Sales Team	(Optional) If you have selected sales manager for **User Position**, you can indicate the sales team.
Sales Representative	(Optional) If you have selected sales manager for **User Position**, you can indicate the sales team members.

Top Opportunities Report

Generates a real-time report of estimated revenue for your top sales prospects.

Select **Analytics** from the home screen, then select **Top Opportunities** to display this report with the default settings. You can edit the report options and save them as the default report, or save this report with a user-defined name in My Reports.

If the SAP system contains multiple line items for the same sales prospect, the account appears only once on the graph, and the graph totals all the expected revenue for all line items associated with the account.

The report dashboard shows a column chart (default), line chart, pie chart, or text view of the top opportunities data. Tap the thumbnail to show a different chart type as the main chart, or zoom to view graph data. If an opportunity has an expected sales volume that is a negative number, you can scroll the column chart to see the negative value reflected on graph.

If you rotate your device to landscape mode, the column chart changes to a bar chart. By default, the column/bar chart shows the expected revenue for each sales prospect; the line chart shows totals of all expected revenues for each month; and the pie chart represents the percentage of total expected revenues for a specific month.

Options appear in alphabetical order.

Table 16. Top Opportunity Report Details

Option	Description
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 are no longer available.
Number of Opportunities	Select the number of opportunities to include.
Period	Select the period: **Previous**, **Current**, **Next**, or **None**. This option appears only if the Closing Date is None.
Sales Representative	If you are a manager and have the appropriate permissions, you can indicate a sales representative or all representatives.
Sort By	Select **Closing Date** or **Expect Sales Volume**.

Option	Description
Sort Order	Select **Ascending** or **Descending**.
Status	Select the sales order status.
Time Frame	Select the time frame: **Monthly**, **Quarterly**, or **None**. This option appears only if the Closing Date is None.

Top Risk Opportunities Report

Generates a real-time risk opportunity report.

Select **Analytics** from the home screen, then select **Top Risk Opportunities** to show this report with the default settings. You can edit the report options and save them as the default report, or save this report with a user-defined name in My Reports.

If the SAP system contains multiple line items for the same sales prospect, the account appears only once on the graph, and the graph totals all the expected revenue for all line items associated with the account.

The report dashboard includes a column chart (default), line chart, pie chart, or text view of the top opportunities data. Tap the thumbnail to show a different chart type as the main chart, or zoom to view graph data. If an opportunity has an expected sales volume that is a negative number, you can scroll the column chart to see the negative value reflected on graph.

If you rotate your device to landscape mode, the column chart changes to a bar chart. By default, the column/bar chart shows the expected revenue for each sales prospect; the line chart shows totals of all expected revenues for each month; and the pie chart represents the percentage of total expected revenues for a specific month.

Options appear in alphabetical order.

Table 17. Top Risk Opportunity Report Details

Option	Description
Number of Opportunities	Select number of opportunities to display.
Sales Representative	If you are a manager and have the appropriate permissions, you can indicate a sales representative or all representatives.
Sales Stage	Select the sales stage.
Sort Order	Select **Closing Date**, **Revenue**, or **Sales Stage**.

Option	Description
Time Frame	Select the time frame: **Last 7 Days**, **Last 30 Days**, or **Last 90 Days**.

CHAPTER 15 Device Data Integration With Mobile Sales

Mobile Sales enables you to integrate some Mobile Sales data with your personal data (PIM integration).

You can:

- Save a CRM contact as a personal contact.
- View and edit personal contacts in Mobile Sales contacts list.

Once integrated, if you edit the information in one place, Mobile Sales automatically synchronizes it. Changes are synchronized between Mobile Sales and native entries once the SAP system accepts the data.

If you change data in your native contacts and the SAP system rejects the changes, the entry gets reverted back to the original data before you made those changes.

In Demo mode, because your device is not connected to the SAP system, updates do not automatically synchronize with Mobile Sales and stay in a pending state.

Saving a CRM Contact as a Personal Contact

Save a CRM business contact as a personal contact.

Prerequisites

In Contacts Settings, turn on **View Personal Contact**, which adds all personal contacts to your Mobile Sales Contacts list. You must turn on this option to save a Mobile Sales contact as a personal contact.

Task

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**.

CHAPTER 16 Uninstalling Mobile Sales

You can delete the Sybase Mobile Sales for SAP CRM application from your device, which removes the application and all Mobile Sales data from the device.

Delete any existing 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.
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 corner of the application icon.

See also

- *Unsubscribing from Mobile Sales* on page 17

CHAPTER 17 Troubleshooting

Determine the cause of problems and apply the recommended solution.

Messages or Field Names Appear in Different Language

Issue: In some cases, SAP system messages and field names appear in the language defined for the SAP system. If the SAP system is set up for English, some warning messages and field names appear in English, for example, when creating or updating an account, contact, or activity, or viewing and editing Analytics report options.

Workaround: None.

Maximum Field Size for Account Values Not Enforced

Issue: When entering values for an account, such as phone numbers or an address, you can enter more characters in a field than the SAP system can accept.

Workaround: Mobile Sales displays an error for the account stating an invalid payload. Reduce the number of characters in the field and resave the account.

Subscription Not Found

Issue: When you try to create a new Mobile Sales object or update an existing one, Mobile Sales displays the message, `Subscription Not Found`.

Solution: Unsubscribe from the SAP system, then log in again.

1. To unsubscribe, select **Settings** > **General** > **Connection Information** > **Unsubscribe**.
2. Click **OK** to delete Mobile Sales data.
3. Start Mobile Sales, then enter your SAP user name and password to log in.

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.

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.

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 empty graph 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.

Index

A

C

D

F

G

H

I

L