SYBASE®

User Guide

Sybase Mobile Sales for SAP® CRM 1.0

Windows Mobile

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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.
- Inspect sales documents.
- Access real-time reports that provide visual forecasts, accurate pipeline data, top sales orders, 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
- Sales Documents
- Today's activities – lists all activities for today. Select an activity from this view to view its fact sheet.
- (Windows Mobile Professional) **Recents** or (Windows Mobile Standard) **Recent Items** – displays the recently viewed items for accounts, contacts, activities, leads, and opportunities. You can change how many recent items appear for each object through Mobile Sales Settings.
- Mobile Sales version information – select **Menu** > **About**.

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. Edit the object to fix the issues that caused the warnings. To remove the warning, open the fact sheet, then select **Menu** > **Remove Warning**. 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. To undo the changes, select **Menu** > **Undo Changes**, or fix the errors by editing the object, then save it. 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.

In Settings, you can determine how data is synchronized for contacts and calendar entries. If you want to work offline, you can disable synchronization in Sybase Settings.

- Select **Menu** > **Programs** > **Sybase Settings**.
- Select **Connection**, then select **Menu** > **Disable**.

Supported Devices

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

- Windows Mobile 6.0.x Standard
- Windows Mobile 6.1.x Standard
- Windows Mobile 6.0.x Professional
- Windows Mobile 6.1.x Professional

See also

- *Installation Prerequisites* on page 3
- *Installing Mobile Sales on Your Windows Mobile Device* on page 5
- *Chapter 11, Uninstalling the Mobile Sales Application* on page 63
- *Chapter 12, Troubleshooting* on page 65

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.

Note: Before installing Sybase Mobile Sales, be sure you have at least 40MB 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.

To preserve disk space for data, delete each CAB file after installing it.

- Create a messaging folder called Notifications.
- Install Microsoft Compact Framework 3.5, `NETCFSetupv35.msi`. You can download it from the Microsoft Web site at *http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=e3821449-3c6b-42f1-9fd9-0041345b3385*.
- (Optional) Install Microsoft Compact Framework for Messaging, `NETCFv35.Messages.EN.wm.cab` if you want to view Windows Mobile error messages for a specific locale.

Note: After installing Microsoft Compact Framework, turn off the device, then turn it back on.

- (Optional) If your company is using Sybase Unwired Platform to provision the Mobile Sales application to your device, install Afaria client. If this step is necessary, you will receive instructions from your system administrator.

See also

- *Supported Devices* on page 3
- *Installing Mobile Sales on Your Windows Mobile Device* on page 5
- *Chapter 11, Uninstalling the Mobile Sales Application* on page 63
- *Chapter 12, Troubleshooting* on page 65

Creating a Notifications Messaging Folder

Create a Notifications messaging folder before installing Sybase Mobile Sales for SAP CRM on your Windows Mobile device.

Note: The Notifications messaging folder collects notifications from the SAP system. It is not used as a regular e-mail account, so be sure to use a fictitious e-mail address and mail server information.

1. Select **Start > Messaging**.

   (Windows Mobile Standard) Select **Start > Programs > Messaging**.
2. Select **Setup E-mail**.
3. Enter a fictitious e-mail address, then select **Next**.
4. Unselect **Try to Get E-mail Settings Automatically From the Internet**, then select **Next**.
5. Select **Internet E-mail** as your e-mail provider, then select **Next**.
6. For **Your Name**, enter `Notifications`.

   Enter it exactly as indicated here. Be sure to capitalize Notifications.
7. In **Account Display Name**, enter `Notifications` again, then select **Next**.
8. Enter a fictitious **Incoming Mail Server**, then select **Next**.
9. Enter a fictitious **User Name**, then select **Next**.
10. Enter a fictitious **Outgoing Mail Server**, then select **Next**.
11. Select **Manually** for **Automatic/Send Receive**, then select **Finish**.

    You do not need to do anything else to maintain this account. You do not need to manually retrieve the e-mail.

Installing Mobile Sales on Your Windows Mobile Device

Install Sybase Mobile Sales for SAP CRM on your Windows Mobile device.

Prerequisites

Review the installation prerequisites, and obtain SAP account and Unwired Server account information.

In many organizations, your system administrator will send you a notification that provides instructions and includes a link that downloads the Mobile Sales application to your device. Alternately, you can copy the CAB files to your device, for example, using ActiveSync. Once the CAB files are on your device, you can install them. Depending on device storage space, you might need to delete each CAB file after installation.

1. Install the CAB files in the following order.
   - `MoMessaging_ppc.cab` for Windows Mobile Professional, or `MoMessaging_sp.cab` for Windows Mobile Standard
   - `SUPObj_ppc.cab` for Windows Mobile Professional, or `SUPObj_sp.cab` for Windows Mobile Standard
   - `SybaseMobileSales_Pro_<version>.CAB` for Windows Mobile Professional, or `SybaseMobileSales_Std_<version>.CAB` for Windows Mobile Standard

   Use File Explorer to find the CAB file on the device, then select the CAB file to begin the installation process. To preserve storage space, delete the CAB file before installing the next one.
2. Select **OK** as many times as required to complete the installation process.
3. Select **Start** > **Programs** > **Sybase Settings** to indicate the Unwired Server connection information before starting the Mobile Sales application.

   Obtain this information from your system administrator.

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.

4. In Sybase Settings, select **Menu > Show Log** to verify your connection to Unwired Server.

Next

Start the Mobile Sales application and log in.

You can perform any of these optional tasks once you are connected to Unwired Server, started the application and logged in, and successfully downloaded the Mobile Sales data from the SAP system.

- Change default application settings for general application behavior, which include how many recent items to display, the default duration for newly created leads, and more. See *Settings* on page 8.
- Change the display order for the fields in the fact sheets for accounts, contacts, activities, leads, opportunities, or sales documents. See *Personalizing a Fact Sheet* on page 10.

See also

- *Supported Devices* on page 3
- *Installation Prerequisites* on page 3
- *Chapter 11, Uninstalling the Mobile Sales Application* on page 63
- *Chapter 12, Troubleshooting* on page 65

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 You need at least 20MB free process memory to start Mobile Sales. If you do not have enough free memory, shut down other applications that you are not currently using.

1. Select **Start > Programs > Mobile Sales**.
2. Enter the SAP account and password.

The Mobile Sales application displays in the language specified for the device.

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. The application splash screen shows the synchronization status while displaying what data is being downloaded to the device.

If you do not see data downloading from SAP server, check the Notifications messaging folder to make sure you are receiving new notifications from the SAP server. If you are not receiving new notifications, verify your connection information is correct and that you are connected to the SAP system. See *Installing Mobile Sales on Your Windows Mobile Device* on page 5.

Checking Available Memory

Before starting the Mobile Sales application, make sure you have enough memory on your Windows Mobile device.

You need at least 20MB free process memory to start Mobile Sales. If you do not have enough free memory, shut down other applications that you are not currently using.

1. Select **Start** > **Settings**.
2. (Windows Mobile Professional) Select the **Systems** tab, then select **Memory**.

   (Windows Mobile Standard) Select **About**. You might need to select **More** to see the About option.
3. Make sure you have enough free memory.
   - (Windows Mobile Professional) Look at the free memory in the Program column.
   - (Windows Mobile Standard) Scroll down to view available memory.

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. Exit the Mobile Sales application.
2. Start the Mobile Sales application.
3. In the login screen, select **Menu > Unsubscribe**.
4. Select **Yes** to confirm you want to unsubscribe.
5. 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 determine default application behavior, change your password, or personalize the fact sheets by indicating which fields you see and their order for accounts, contacts, activities, leads, and opportunities.

Settings

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

On the home screen, select **Menu** > **Options** > **Settings** to view or change.

Table 3. Mobile Sales settings

Option	Description
Show Last Name First	Displays last name first for contacts.
Log Phone Call	Indicates that the application displays a pop-up so you can log the phone call as a Mobile Sales activity.
Recent Items Display	Indicates how many recent items to display for accounts, contacts, activities, leads, opportunities, and sales documents.

Option	Description
Default Lead Duration (Days)	Indicates the default duration for newly created leads. The default is 30 days. The default start date is the current date, and the end date is set *n* days from the start date, based on this setting.
Default Opportunity Duration (Days)	Indicates the default duration for newly created opportunities. The default is 30 days. The default start date is the current date, and the end date is set *n* days from the start date, based on this setting.
Application Timeout (Minutes)	Indicates how many minutes before the application times out and a password is required to regain access. If you select 0 (zero), the application never times out.
Display Notification Bubble	(Windows Mobile Professional only) Displays an alert if you receive a notification when a lead, opportunity, or activity is created in the SAP system.

See also

- *Changing Your Password* on page 9
- *Personalizing a Fact Sheet* on page 10
- *Viewing Notifications* on page 11

Changing Your Password

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

Prerequisites

Ask your company to change your password in the SAP system before changing it on the device using this screen.

1. Select **Menu** > **Options** > **Change Password**.
2. Click **OK** to close the warning message that indicates to change the password first on the SAP system.
3. Enter the new **Password**.
4. Select **Save**.

The password validates against the SAP server during the next synchronization.

See also

- *Settings* on page 8
- *Personalizing a Fact Sheet* on page 10
- *Chapter 12, Troubleshooting* on page 65

Personalizing a Fact Sheet

Personalize the fact sheets by indicating which fields you see and in what order.

You can personalize the fact sheets for accounts, contacts, activities, leads, and opportunities.

1. Select **Accounts**, **Contacts**, **Activities**, **Leads**, **Opportunities**, or **Sales Documents**.
2. Select an object to display the fact sheet.
3. Select **Menu** > **Personalize**.
4. Highlight a field.

Options	Description
To hide the field	Select **Menu** > **Hide Item**.
To move the field up	Select **Menu** > **Move Up**.
To move the field down	Select **Menu** > **Move Down**.
To display a hidden field	1. Select **Menu** > **Show Item**. 2. Select the item to unhide, then click **Add**. 3. Position the item in the proper location using **Move Up** or **Move Down**.
Restore fact sheet defaults	Select **Menu** > **Restore Defaults**.

5. Select **Done**.

See also

- *Settings* on page 8
- *Changing Your Password* on page 9

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.

For Windows Mobile Professional, if you selected **Display Notification Bubble** in the Mobile Sales Settings, you receive a bubble message when you receive a new notification.

1. Go to your Notifications messaging account.
2. Select a notification email to view its contents.
3. (Windows Mobile Professional) Select **View in CRM** to see the lead, opportunity, or activity and all its details in the Mobile Sales application.

See also

- *Deleting and Clearing Notifications* on page 11
- *Settings* on page 8

Deleting and Clearing Notifications

Delete an individual notification, or clear all notifications.
Go to your Notifications messaging account.

See also

- *Viewing Notifications* on page 11

CHAPTER 2 Searching

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

Search type	Description
Search	A search enables you to search your device data for a record in a list. You can indicate a text string, which filters the results you see. You see results for any field displayed in the list.
Advanced search	An advanced search enables you to further narrow your search for data on your device by indicating a text string or specific values from a drop-down for some of the object's fields.
Online lookup	An online lookup enables you to search records on the SAP system. When performing an online search, you must use text with asterisk characters instead of a simple text string. You can peform an online lookup for all objects except contacts.

See also

- *Chapter 3, Account Management* on page 17
- *Chapter 4, Contacts Management* on page 27
- *Chapter 5, Activity Management* on page 37
- *Chapter 6, Lead Management* on page 43
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 8, Analytics* on page 53
- *Chapter 9, Sales Documents* on page 59

Performing an Advanced Search

Advanced searches enable you to narrow the results list.

You can perform an advanced search on device data for accounts, contacts, activities, leads, opportunities, and sales documents. You can indicate a text string or select specific values from a drop-down for some of the object's fields.

1. On the Mobile Sales home page, select **Accounts**, **Contacts**, **Activities**, **Leads**, **Opportunities**, or **Sales Documents**.
2. Open the advanced search screen.
   - For Windows Mobile Professional, select **Menu** > **Advanced Search**.
   - For Windows Mobile Standard, select **Menu** > **Search** > **Advanced**.
3. Enter a text string or select from the drop-down list to indicate search criteria.

   You can leave fields blank to search on all values for that field.
4. Click **OK**.

See also

- *Searching Using Online Lookup* on page 14
- *Deleting an Online Search* on page 15

Searching Using Online Lookup

Perform an online lookup to search for records on the SAP system. You must have network connectivity to perform an online lookup.

You can create an online lookup for accounts, leads, activities, opportunities, and sales documents. Online lookup searches are automatically saved.

Note: The system can only return a maximum of 1MB of data, so broad searches may return only a subset of the data or return no data. To ensure you see the all results you want, limit the data set by indicating additional search parameters.

1. On the Mobile Sales home screen, select **Accounts**, **Activities**, **Leads**, **Opportunities**, or **Sales Documents**.
2. Open the online lookup screen.
   - (Windows Mobile Professional) Select **Menu** > **Online Lookup**.
   - (Windows Mobile Standard) Select **Menu** > **Search** > **Online Lookup**.
3. Select **New Search** to create a new online lookup, or double-click a saved search.
4. If creating a new search, enter text with asterisks or select values from the drop-down lists for the appropriate fields.

   Note: Categories are created in the SAP system. If you created the object in Mobile Sales, it does not have a category.
5. Click **OK**.

You can view only those searches that received data from the SAP system. If you perform an online lookup without network connectivity, the online lookup returns in a pending state until you have network connectivity.

See also

- *Performing an Advanced Search* on page 13
- *Deleting an Online Search* on page 15

Deleting an Online Search

Delete an online lookup search.

You can delete only those searches that received data from the SAP system.

1. On the Mobile Sales home screen, click **Accounts**, **Activities**, **Leads**, **Opportunities**, or **Sales Documents**.
2. Open the online lookup screen.
   - (Windows Mobile Professional) Select **Menu** > **Online Lookup**.
   - (Windows Mobile Standard) Select **Menu** > **Search** > **Online Lookup**.
3. Highlight the online lookup to delete, then select **Menu** > **Delete**.

See also

- *Performing an Advanced Search* on page 13
- *Searching Using Online Lookup* on page 14

CHAPTER 3 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 2, Searching* on page 13
- *Chapter 4, Contacts Management* on page 27
- *Chapter 5, Activity Management* on page 37
- *Chapter 6, Lead Management* on page 43
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 8, Analytics* on page 53
- *Chapter 9, Sales Documents* on page 59

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, or filter or sort the list of accounts.

1. On the home screen, select **Accounts**.
2. Find the account.

To	Do this
Search for the account using a text string	Enter a text string to narrow and display the results.
View recent accounts	• (Windows Mobile Professional) Select **Filter By** > **Recent**. • (Windows Mobile Standard) Select **Menu** > **Show** > **Recent**.
Sort the accounts	• (Windows Mobile Professional) Select **Sort By**, then **All**, **Name**, **City**, or **State**. • (Windows Mobile Standard) Select **Menu** > **Sort By**, then select **Name** or **City**.

3. Select the account to view.

See also

- *Viewing Accounts* on page 18
- *Creating a New Account* on page 23
- *Creating a Lead for an Account* on page 24
- *Creating an Opportunity for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 23
- *Updating Account Details* on page 25

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. Select **Show On Map** to see the location on a map.

   For Windows Mobile Standard, select **Menu** > **View On Map**.
4. (Optional) Adjust map display.
   - (Windows Mobile Professional) Select **Zoom** or **Rotate**.
   - (Windows Mobile Standard) Select **Menu**, then **Zoom In**, **Zoom Out**, **Rotate Left**, or **Rotate Right**.
5. Select **OK** when finished viewing map.

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 contain a specific text string	Enter the text string.

See also

- *Searching Accounts* on page 17
- *Creating a New Account* on page 23
- *Creating a Lead for an Account* on page 24
- *Creating an Opportunity for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 23

• *Updating Account Details* on page 25

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 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 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) Narrow the activities list.

Option	Description
Filter By	Filters the activities list by activity type. For Windows Mobile Standard, select **Menu > Show**, then the activity type.
Sort By	Sorts the activities list by **Date**, **Type**, **Status**, or **Name**. For Windows Mobile Standard, select **Menu > Sort By**, then select the appropriate option.

5. Select an activity to view its fact sheet.

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) Sort the leads list by **Name**, **Date**, or **Status**.

   For Windows Mobile Standard, select **Menu > Sort By**, then select the appropriate option.
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 19
- *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. Select the opportunity to view its fact sheet.
   a) View items, which are potential sales orders.
      - (Windows Mobile Professional) Select **Items**.
      - (Windows Mobile Standard) Select **Menu > Items**.

   b) Select **Notes** , then **Edit** to add or edit the notes for this opportunity. For Windows Mobile Standard, select **Edit**, then scroll down to the Notes field to add or edit.

See also

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

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. (Optional) Narrow the list.

Option	Description
Filter By	Filters the interactions list by interaction type: **Activities**, **Leads**, **Opportunities**, or **Sales Documents**. For Windows Mobile Standard, select **Menu > Show**, then select the type.
Sort By	Sorts the interactions list by **Date**, **Type**, **Status**, or **Name**. . • (Windows Mobile Professional) Select **Sort By**, then the appropriate option. • (Windows Mobile Standard) Select **Menu > Sort**, then the appropriate option.

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 19
- *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 19
- *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.

Prerequisites

If you want to log calls as CRM activities, select the Log Phone Call setting. See *Settings* on page 8.

1. On the home screen, select **Accounts**.
2. Select **Call**.

   The application displays all the phone numbers and partners functions associated with the account.
3. Select the phone number to call.

   Highlight the phone number, then select **Call**.
4. Verify the phone number is correct, or edit it.
5. Select **Dial**.
6. If you selected the **Log Phone Call** setting, after you end the call, log the phone call as a CRM activity.

   The applications displays a pop-up asking if you want to log the phone call as a CRM activity.

   a) Click **Yes**.

   b) Follow the screens to finish creating the activity.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 18
- *Creating a New Account* on page 23
- *Creating a Lead for an Account* on page 24
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- *E-mailing an Account* on page 23
- *Updating Account Details* on page 25
- *Logging a Phone Call as an Activity* on page 39

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. If prompted, select the e-mail account.
5. Enter the e-mail text, then select **Send**.
6. (Optional) Log this e-mail or another e-mail as a CRM activity.
   a) For sent items, open the message in the Sent Items folder in the native e-mail application. For incoming e-mails, open the e-mail message.
   b) Select **Menu > Log as CRM Activity**.

   The application displays the New Activity screen, with the activity type as Outgoing E-mail or Incoming E-mail. The e-mail subject line is the description, and the e-mail body becomes the activity notes.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 18
- *Creating a New Account* on page 23
- *Creating a Lead for an Account* on page 24
- *Creating an Opportunity for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *Updating Account Details* on page 25
- *Logging an E-mail as an Activity* on page 40

Creating a New Account

Create a new account.

1. Select **Accounts**.
2. Select **Menu > Create Account**.
3. Select **Corporate Account** or **Individual Account**, then click **Next**.
4. Enter the applicable account details, then click **Save**.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 18

- *Creating a Lead for an Account* on page 24
- *Creating an Opportunity for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 23
- *Updating Account Details* on page 25

Creating a Lead for an Account

Create a new lead for an account.

1. Select **Accounts**.
2. Select an account to view the account fact sheet.
3. (Windows Mobile Standard). Select **Leads**.
4. Select **Menu > Create Lead**.
5. Select the **Lead Type**, then click **Next**.
6. Select the **Partner Type**, then click **Next**.
7. Enter the lead details, then select **Next**.
8. Select **Save**.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 18
- *Creating a New Account* on page 23
- *Creating an Opportunity for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 23
- *Updating Account Details* on page 25

Creating an Opportunity for an Account

Create a new opportunity for an account.

1. Select **Accounts**.
2. Select an account to view its fact sheet.
3. (Windows Mobile Standard). Select **Opportunities**.
4. Select **Menu > Create Opportunity**.
5. Select the **Opportunity Type**, then **Next**.

6. Select the **Partner Type**, then **Next**.
7. Enter the opportunity details, then **Next**.
8. Select **Save**.

See also

- *Searching Accounts* on page 17
- *Viewing Accounts* on page 18
- *Creating a New Account* on page 23
- *Creating a Lead for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 23
- *Updating Account Details* on page 25

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** for Windows Mobile Professional, or **Menu** > **Edit Account** for Windows Mobile Standard.
4. Update the information in the appropriate fields.
5. Update the information, then select **Save**.

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 18
- *Creating a New Account* on page 23
- *Creating a Lead for an Account* on page 24
- *Creating an Opportunity for an Account* on page 24
- *Calling the Account Phone Number* on page 22
- *E-mailing an Account* on page 23

Adding a Contact Relationship to an Account

Create a new contact or associate an existing contact to 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 **Relationships**.
4. Select **Menu Add Contact**.
5. Select to choose an existing contact or create a new one.

Option	Description
Select existing contact	**1.** For Windows Mobile Professional, select **Select Existing Contact**, then click **...** to select the contact from the contacts list. For Windows Mobile Standard, the contacts list appears. **2.** Highlight the contact, then click **OK**.
Create new contact	**1.** For Windows Mobile Professional, select **Could Not Find the Contact? Continue With Creating a New Contact**, then **Next**. For Windows Mobile Standard, select **Menu > Create Contact**. **2.** Enter the work contact details, then select **Next**. **3.** Enter alternate contact details, then select **Save**.

See also

- *Creating or Editing a Note for an Account* on page 26

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. Select **Edit**.
5. Enter the note text, then select **Save**.

See also

- *Adding a Contact Relationship to an Account* on page 26

CHAPTER 4 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, Searching* on page 13
- *Chapter 3, Account Management* on page 17
- *Chapter 5, Activity Management* on page 37
- *Chapter 6, Lead Management* on page 43
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 8, Analytics* on page 53
- *Chapter 9, Sales Documents* on page 59

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. Find the contact.

To	Do this
Search using a text string	Enter a text string to narrow and display the results.
View recent contacts	• (Windows Mobile Professional) Select **Filter By** > **Recent Items**. • (Windows Mobile Standard) Select **Menu** > **Show** > **Recent**.
Sort the contacts by company	• (Windows Mobile Professional) Select **Sort By** > **Company**. • (Windows Mobile Standard) Select **Menu** > **Sort By** > **Company**.

3. Select the contact to view.

See also

- *Viewing Contacts* on page 28

- *Updating Contact Details* on page 33
- *Creating a New Business Contact* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Creating or Editing a Note for a Contact* on page 35
- *Calling a Contact* on page 31
- *E-mailing a Contact* on page 32

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.

   (Windows Mobile Standard) Select **Menu > View On Map**.
4. (Optional) Double-click to zoom in.

Viewing Contacts

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

To	Do this
View contact details	Select the contact.
View recently viewed contacts	• (Windows Mobile Professional) Select **Filter By > Recent Contacts**. • (Windows Mobile Standard) Select **Menu > Show > Recent**.
View contacts that contain a specific text string	Enter a text string to narrow and display the results.

See also

- *Searching Contacts* on page 27
- *Updating Contact Details* on page 33
- *Creating a New Business Contact* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Creating or Editing a Note for a Contact* on page 35
- *Calling a Contact* on page 31
- *E-mailing a Contact* on page 32

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, select **Address**.
4. (Optional) Select **Edit** to modify the information.
   a) Select **Next** to skip work information and to view or edit alternate contact information.
   b) Select **Save** when finished.

See also

- *Viewing Relationships for a Contact* on page 29
- *Viewing Activities for a Contact* on page 30
- *Viewing Leads for a Contact* on page 30
- *Viewing Opportunities for a Contact* on page 30
- *Viewing Contact Interaction History* on page 31

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 29
- *Viewing Activities for a Contact* on page 30
- *Viewing Leads for a Contact* on page 30
- *Viewing Opportunities for a Contact* on page 30
- *Viewing Contact Interaction History* on page 31

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. Select an activity to view its fact sheet.

See also

- *Viewing and Editing Alternate Contact Information* on page 29
- *Viewing Relationships for a Contact* on page 29
- *Viewing Leads for a Contact* on page 30
- *Viewing Opportunities for a Contact* on page 30
- *Viewing Contact Interaction History* on page 31

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. Select the lead to view its fact sheet.

See also

- *Viewing and Editing Alternate Contact Information* on page 29
- *Viewing Relationships for a Contact* on page 29
- *Viewing Activities for a Contact* on page 30
- *Viewing Opportunities for a Contact* on page 30
- *Viewing Contact Interaction History* on page 31

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. Select an opportunity to view its fact sheet.

a) Select **Items** to view potential sales orders and quantities. For Windows Mobile Standard, select **Menu** > **Items**.
b) Select **Menu** > **Add** to add a new item, or select an existing item, then **Edit** to edit the item information.
c) Select **Notes** to view the notes for this opportunity.

See also

- *Viewing and Editing Alternate Contact Information* on page 29
- *Viewing Relationships for a Contact* on page 29
- *Viewing Activities for a Contact* on page 30
- *Viewing Leads for a Contact* on page 30
- *Viewing Contact Interaction History* on page 31

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 an item to view interaction details.

See also

- *Viewing and Editing Alternate Contact Information* on page 29
- *Viewing Relationships for a Contact* on page 29
- *Viewing Activities for a Contact* on page 30
- *Viewing Leads for a Contact* on page 30
- *Viewing Opportunities for a Contact* on page 30

Calling a Contact

Call a contact from within the Mobile Sales application.

Prerequisites

If you want to log calls as CRM activities, select the Log Phone Call setting. See *Settings* on page 8.

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

3. Select the phone number to call.
4. Confirm the phone number, then select **Dial**.
5. If you selected the **Log Phone Call** setting, after you end the call, log the phone call as a CRM activity.

   The applications displays a pop-up asking if you want to log the phone call as a CRM activity.

   a) Click **Yes**.
   b) Follow the screens to finish creating the activity.

See also

- *Searching Contacts* on page 27
- *Viewing Contacts* on page 28
- *Updating Contact Details* on page 33
- *Creating a New Business Contact* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Creating or Editing a Note for a Contact* on page 35
- *E-mailing a Contact* on page 32
- *Logging a Phone Call as an Activity* on page 39

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. Select **Menu** > **Email**.
4. If more than one e-mail address, select one, then select **Email**.
5. Select the e-mail account to use.
6. Enter the e-mail text, then select **Send**.
7. (Optional) Log this e-mail or another e-mail as a CRM activity.
   a) For sent items, open the message in the Sent Items folder in the native e-mail application. For incoming e-mails, open the e-mail message.
   b) Select **Menu** > **Log as CRM Activity**.

   The application displays the New Activity screen, with the activity type as Outgoing E-mail or Incoming E-mail. The e-mail subject line is the description, and the e-mail body becomes the activity notes.

See also

- *Searching Contacts* on page 27
- *Viewing Contacts* on page 28

- *Updating Contact Details* on page 33
- *Creating a New Business Contact* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Creating or Editing a Note for a Contact* on page 35
- *Calling a Contact* on page 31
- *Logging an E-mail as an Activity* on page 40

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. Edit the work information, then select **Next**.
5. Edit the alternate contact information, then select **Next**.
6. Select **Save** when finished.

You can see the Pending Changes icon at the top of the fact sheet. 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 27
- *Viewing Contacts* on page 28
- *Creating a New Business Contact* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Creating or Editing a Note for a Contact* on page 35
- *Calling a Contact* on page 31
- *E-mailing a Contact* on page 32

Creating a New Business Contact

Create a new CRM contact and associate it with an account.

1. On the home screen, select **Contacts**.
2. Select **Create Contact**.

3. Enter work information, then click **Next**.

   You must enter a country.
4. (Optional) Enter alternate contact information, then click **Save**.

See also

- *Adding a Contact Relationship to an Account* on page 26
- *Searching Contacts* on page 27
- *Viewing Contacts* on page 28
- *Updating Contact Details* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Creating or Editing a Note for a Contact* on page 35
- *Calling a Contact* on page 31
- *E-mailing a Contact* on page 32

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. Select **Menu > Save As Personal Contact**, then select **OK**.

See also

- *Searching Contacts* on page 27
- *Viewing Contacts* on page 28
- *Updating Contact Details* on page 33
- *Creating a New Business Contact* on page 33
- *Creating or Editing a Note for a Contact* on page 35
- *Calling a Contact* on page 31
- *E-mailing a Contact* on page 32

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. Select **Edit**.
5. Enter the note text, then select **Save**.

See also

- *Searching Contacts* on page 27
- *Viewing Contacts* on page 28
- *Updating Contact Details* on page 33
- *Creating a New Business Contact* on page 33
- *Saving a CRM Contact as a Personal Contact* on page 34
- *Calling a Contact* on page 31
- *E-mailing a Contact* on page 32

CHAPTER 5 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, Searching* on page 13
- *Chapter 3, Account Management* on page 17
- *Chapter 4, Contacts Management* on page 27
- *Chapter 6, Lead Management* on page 43
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 8, Analytics* on page 53
- *Chapter 9, Sales Documents* on page 59

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. Find the activity.

To	Do this
Search using a text string	Enter the text string.
Filter by activity type	• (Windows Mobile Professional) Select **Filter By**, then the activity type. • (Windows Mobile Standard) Select **Menu** > **Show**, then the activity type.
Sort the activities	You can sort by **Date**, **Type**, **Name**, or **Status**. • (Windows Mobile Professional) Select **Sort By**. • (Windows Mobile Standard) Select **Menu** > **Sort By**.

3. Select the activity to view its fact sheet.

See also

- *Adding a New Activity for Account or Contact* on page 38
- *Adding an Existing Activity to Account or Contact* on page 39
- *Logging a Phone Call as an Activity* on page 39
- *Logging an E-mail as an Activity* on page 40

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. Select **Add New Activity** for Windows Mobile Professional, or **Create Activity** for Windows Mobile Standard.
3. In the **Create Activity** screen, select the activity type, then **Next** .
   - 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.
5. (Optional) Change when the activity starts or ends.
6. (Optional) Add **Notes** for this activity.

   For Windows Mobile Standard, select **Next** to continue.
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.

Option	Description
Activity Partner	Select one or more contacts as the activity partner.
Contact Person	Select one or more contacts.
Attendee	Select one or more contacts to include with this activity.
Employee Responsible	Employee responsible for the activity.

8. Select **Save**.

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 37
- *Adding an Existing Activity to Account or Contact* on page 39
- *Logging a Phone Call as an Activity* on page 39
- *Logging an E-mail as an Activity* on page 40

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. Select **Menu > Edit Activity**.
4. Modify existing information, or add new activity partners, contacts, owner, or attendees.

   For Windows Mobile Standard, select **Next** to continue.
5. Select **Save**.

See also

- *Searching and Viewing Activities* on page 37
- *Adding a New Activity for Account or Contact* on page 38
- *Logging a Phone Call as an Activity* on page 39
- *Logging an E-mail as an Activity* on page 40

Logging a Phone Call as an Activity

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

If you selected **Log Phone Call** in Settings, you can also log the phone call as an activity from the call log.

1. On the home screen, select **Activities**.
2. Select **Create Activity**.
3. In the **Create 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. Select **Save**.

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 37
- *Adding a New Activity for Account or Contact* on page 38
- *Adding an Existing Activity to Account or Contact* on page 39
- *Logging an E-mail as an Activity* on page 40
- *Calling the Account Phone Number* on page 22
- *Calling a Contact* on page 31

Logging an E-mail as an Activity

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

You can also log the e-mail as an activity from the email Inbox or Outbox. Open the e-mail, then select **Menu > Create As Activity**. The contents of the e-mail are added to the notes for the new activity.

1. On the home screen, select **Activities**.
2. Select **Create Activity**.
3. In the **Create 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. Select **Save**.

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 37

- *Adding a New Activity for Account or Contact* on page 38
- *Adding an Existing Activity to Account or Contact* on page 39
- *Logging a Phone Call as an Activity* on page 39
- *E-mailing an Account* on page 23
- *E-mailing a Contact* on page 32

Updating an Activity

Edit the details for an activity.

1. On the home screen, select **Activities**.
2. Highlight the activity to edit.
3. Select **Menu > Edit Activity**.
4. Make the appropriate changes.

   (Windows Mobile Standard) Select **Next** to add or change activity partners.
5. Select **Save**.

CHAPTER 6 Lead Management

Manage your leads to determine their potential to become opportunities.

You can view existing leads, create a new lead, update lead details, associate potential products and quantity information with that lead, and add or edit notes for the lead.

See also

- *Chapter 2, Searching* on page 13
- *Chapter 3, Account Management* on page 17
- *Chapter 4, Contacts Management* on page 27
- *Chapter 5, Activity Management* on page 37
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 8, Analytics* on page 53
- *Chapter 9, Sales Documents* on page 59

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. Find the lead.

To	Do this
Search using a text string	Enter a text string to narrow and display the results.
View recent items	• (Windows Mobile Professional) Select **Filter By** > **Recent Items**. • (Windows Mobile Standard) Select **Menu** > **Show** > **Recent**.
Sort the leads	You can sort leads by **Name**, **Date**, or **Status**. • (Windows Mobile Professional) Select **Sort By**. • (Windows Mobile Standard) Select **Menu** > **Sort By**.

3. Select the lead to view.

See also

- *Creating a New Lead* on page 44
- *Updating Lead Details* on page 45

Creating a New Lead

Create a new lead and associate contacts for that lead.

1. From the home screen, select **Leads**.
2. Create a new lead.
   - (Windows Mobile Professional) Select **Create Lead**.
   - (Windows Mobile Standard) Select **Menu** > **Create Lead**.
3. Select the **Lead Type**, then **Next**.
4. Enter a **Description**.
5. (Optional) Change the **Start** or **End** dates.

   The status remains Open until the the SAP system accepts the lead. Once the SAP system accepts the lead, you can edit the status.
6. (Optional) Add some **Notes**.
7. (Windows Mobile Standard) Select **Next** to continue.
8. Indicate the contacts associated with the lead.

Option	Description
Sales Prospect	Select one or more accounts or contacts.
Sales Employee	Select one more contacts.
Contact Person	Select one or more contacts.
Employee Responsible	Select the employee responsible for the account.

9. (Optional) Select **Menu** > **Add** to add an item (product) to a lead.

   You can also search for the product by performing an online search. You must have network connectivity to perform an online lookup. If you attempt an online lookup without network connectivity, the application hangs until you are connected with the network. To continue working offline, cancel the search.

   a) Enter a **Description** (including the required asterisk as a wildcard).
   b) Select **Search By Description**. The SAP server returns all products that match the search criteria.
   c) Select a product.
10. Select **Save**.

See also

- *Searching and Viewing Leads* on page 43
- *Updating Lead Details* on page 45

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. (Windows Mobile Standard) Select **Next** to continue.
6. Select **Save**.

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 43
- *Creating a New Lead* on page 44

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. Select **Edit**.
4. In the Notes box, add or edit text.
5. (Windows Mobile Standard) Select **Next** to continue.
6. Select **Save**.

See also

- *Editing an Item for a Lead* on page 46
- *Adding a New Item to a Lead* on page 46

Editing an Item for a Lead

Edit an item for a lead.

1. On the home page, select **Leads**.
2. Select a lead to view the lead fact sheet.
3. View the existing items for the lead.
    - (Windows Mobile Professional) Near the bottom of the screen, select **Items**.
    - (Windows Mobile Standard) Select **Menu** > **Items**.
4. Highlight the item to edit.
    - (Windows Mobile Professional) Select **Edit**.
    - (Windows Mobile Standard) Select**Menu** > **Edit**.
5. Edit the item details, then select **Save**.

    Some fields are grayed out and may not be editable. If you need to change the product ID or description, delete the item and create a new item.

See also

- *Creating or Editing a Note for a Lead* on page 45
- *Adding a New Item to a Lead* on page 46

Adding a New Item to a Lead

Add a new item to a lead.

1. On the home page, select **Leads**.
2. Select a lead to view its fact sheet.
3. View the existing items for the lead.
    - (Windows Mobile Professional) Near the bottom of the screen, select **Items**.
    - (Windows Mobile Standard) Select **Menu** > **Items**.
4. Select **Menu** > **Add**.
5. (Optional) Search for the product by performing an online search.

    You must have network connectivity to perform an online lookup. If you attempt an online lookup without network connectivity, the application hangs until you are connected with the network. To continue working offline, cancel the search.

    a) Enter a **Description** (including the required asterisk as a wildcard).
    b) Select **Search By Description**. The SAP server returns all products that match the search criteria.
    c) Select a product.
6. Complete the item details, then select **Save**.

Once you move to a difference screen, the item is sent to the SAP system.

See also

- *Creating or Editing a Note for a Lead* on page 45
- *Editing an Item for a Lead* on page 46

CHAPTER 7 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, Searching* on page 13
- *Chapter 3, Account Management* on page 17
- *Chapter 4, Contacts Management* on page 27
- *Chapter 5, Activity Management* on page 37
- *Chapter 6, Lead Management* on page 43
- *Chapter 8, Analytics* on page 53
- *Chapter 9, Sales Documents* on page 59

Searching and Viewing Opportunities

Search to find an opportunity.

1. On the home screen, select **Opportunities**.
2. Find the opportunity.

To	Do this
Search using a text string	Enter a text string to narrow and display the results.
View recent items	• (Windows Mobile Professional) Select **Filter By > Recent Items**. • (Windows Mobile Standard) Select **Menu > Show > Recent**.
Sort the opportunities	You can sort opportunities by **Name**, **Date**, **Chance**, or **Status**. • (Windows Mobile Professional) Select **Sort By**. • (Windows Mobile Standard) Select **Menu > Sort By**.

See also

- *Updating Opportunity Details* on page 50

- *Creating an Opportunity* on page 50
- *Adding a New Line Item to an Opportunity* on page 51
- *Updating an Opportunity Line Item* on page 52

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. Update the information.
5. (Windows Mobile Standard) Select **Next** to continue.
6. Select **Save**.

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 49
- *Creating an Opportunity* on page 50
- *Adding a New Line Item to an Opportunity* on page 51
- *Updating an Opportunity Line Item* on page 52

Creating an Opportunity

Create a new opportunity

1. On the home screen, select **Opportunities**.
2. Select **Create Opportunity**.
3. Select the **Opportunity Type**, then **Next**.
4. Enter a **Description**.
5. (Optional) Enter information in the other applicable fields, then select **Next**.
6. (Windows Mobile Standard) Indicate the associated contacts and accounts, then select **Next**.
7. (Optional) Select **Menu > Add** to add an item (product) to an opportunity.

   You can also search for the product by performing an online search. You must have network connectivity to perform an online lookup. If you attempt an online lookup without network connectivity, the application hangs until you are connected with the network. To continue working offline, cancel the search.

a) Enter a **Description** (including the required asterisk as a wildcard).
b) Select **Search By Description**. The SAP server returns all products that match the search criteria.
c) Select a product.

8. Select **Save**.

See also

- *Searching and Viewing Opportunities* on page 49
- *Updating Opportunity Details* on page 50
- *Adding a New Line Item to an Opportunity* on page 51
- *Updating an Opportunity Line Item* on page 52

Adding a New Line Item to an Opportunity

Add an item to an opportunity.

1. On the home screen, select **Opportunities**.
2. Select an opportunity to view its fact sheet.
3. View the existing items for the opportunity.
   - (Windows Mobile Professional) Near the bottom of the screen, select **Items**.
   - (Windows Mobile Standard) Select **Menu** > **Items**.
4. Select **Menu** > **Add**.
5. Enter the **Product ID** and **Quantity**.
6. (Optional) Add a **Description** or indicate the **Unit of Measure**.
7. (Optional) Select **Search on Description** to perform an online lookup on the SAP system.

   Note: Because you are performing an online lookup, be sure to indicate text with asterisks for your search.

8. Select **Save**.

   Once you move to a difference screen, the item is sent to the SAP system.

See also

- *Searching and Viewing Opportunities* on page 49
- *Updating Opportunity Details* on page 50
- *Creating an Opportunity* on page 50
- *Updating an Opportunity Line Item* on page 52

Updating an Opportunity Line Item

Edit a line item associated with a lead.

1. On the home screen, select **Opportunities**.
2. Select the opportunity to view its fact sheet.
3. View the existing items for the opportunity.
   - (Windows Mobile Professional) Near the bottom of the screen, select **Items**.
   - (Windows Mobile Standard) Select **Menu** > **Items**.
4. Highlight a line item.
   - (Windows Mobile Professional) Select **Edit**.
   - (Windows Mobile Standard) Select **Menu** > **Edit**.
5. Change the appropriate information, then select **Save**.

   Some fields are grayed out and may not be editable. If you need to change the product ID or description, delete the item and create a new item.

See also

- *Searching and Viewing Opportunities* on page 49
- *Updating Opportunity Details* on page 50
- *Creating an Opportunity* on page 50
- *Adding a New Line Item to an Opportunity* on page 51

CHAPTER 8 Analytics

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

See also

- *Chapter 2, Searching* on page 13
- *Chapter 3, Account Management* on page 17
- *Chapter 4, Contacts Management* on page 27
- *Chapter 5, Activity Management* on page 37
- *Chapter 6, Lead Management* on page 43
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 9, Sales Documents* on page 59

Report Types

The Sybase Mobile Sales for SAP CRM includes predefined reports.

You can toggle between graph view or table view by selecting **Chart** or **Table**, respectively.

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.
Top Sales Order	Displays the top sales orders.

See also

- *Viewing Reports and Editing Report Criteria* on page 54
- *Creating a Pipeline Report* on page 54
- *Creating a Top Opportunities Report* on page 55
- *Creating a Top Risk Opportunities Report* on page 56
- *Creating a Top Sales Order Report* on page 57

Viewing Reports and Editing Report Criteria

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

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.
      - Select **Save** to save your changes to the current report.
      - (Windows Mobile Professional) Select **Save As** to save the report to a different name.
      - (Windows Mobile Standard) Select **Menu** > **Save As** to save the report to a different name.

See also

- *Creating a Pipeline Report* on page 54
- *Creating a Top Opportunities Report* on page 55
- *Creating a Top Risk Opportunities Report* on page 56
- *Creating a Top Sales Order Report* on page 57
- *Report Types* on page 53

Creating a Pipeline Report

Create a pipeline report.

1. On the home screen, select **Analytics**.
2. Select **Menu** > **Create Pipeline Report**.
3. Indicate the report details.

Table 4. Pipeline report details

Option	Description
Name	Enter a name for the report.
Period	Select the period: **Monthly** or **Quarterly**.

Option	Description
Weighting	Weights the opportunities based on their chance of success. Select **True** or **False**.
Position	If the position you choose is a sales manager position, the next two fields appear.
Sales Team	If you are a manager and you chose a sales manager for **Position**, you can indicate the sales team.
Sales Team Member	If you are a manager and you chose a sales manager for **Position**, you can indicate the sales team members.

4. Select **Save**.

   This report is now available in **My Reports**.

See also

- *Viewing Reports and Editing Report Criteria* on page 54
- *Creating a Top Opportunities Report* on page 55
- *Creating a Top Risk Opportunities Report* on page 56
- *Creating a Top Sales Order Report* on page 57
- *Report Types* on page 53

Creating a Top Opportunities Report

Create an opportunity report.

1. On the home screen, select **Analytics**.
2. Select **Menu** > **Create Opportunity Report**.
3. Indicate the report details.

Table 5. Top Opportunity report details

Option	Description
Name	Enter a name for the report.
Status	Select the sales order status.
Period	Select the period: **Previous**, **Current**, **Next**, or **None**. Select **None** if specifying a closing date.

Option	Description
Time Frame	Select the time frame: **Monthly**, **Quarterly**, or **None**. Select **None** if specifying a closing date.
Closing Date	Indicates the cut-off date for the opportunities to qualify for the report. Select a date on the calendar, or **None**.
Sales Rep	If you are a manager, you can indicate a sales representative or all representatives.
# Of Opportunities	Select number of opportunities to display.
Sort By	Select **Closing Date** or **Expected Revenue**.
Sort Order	Select **Ascending** or **Descending**.

4. Select **Save**.

   This report is now available in **My Reports**.

See also

- *Viewing Reports and Editing Report Criteria* on page 54
- *Creating a Pipeline Report* on page 54
- *Creating a Top Risk Opportunities Report* on page 56
- *Creating a Top Sales Order Report* on page 57
- *Report Types* on page 53

Creating a Top Risk Opportunities Report

Create a risk opportunity report.

1. On the home screen, select **Analytics**.
2. Select **Menu > Create Risk Opportunity Report**.
3. Indicate the report details.

Table 6. Top Risk Opportunity report details

Option	Description
Name	Enter a name for the report.
Sales Stage	Select the sales stage.
Time Frame	Select the time frame: **Last 7 Days**, **Last 30 Days**, or **Last 90 Days**.

Option	Description
Sales Rep	If you are a manager, you can indicate a sales representative or all representatives.
# Of Opportunities	Select number of opportunities to display.
Sort Order	Select **Closing Date**, **Revenue**, or **Sales Stage**.

4. Select **Save**.

   This report is now available in **My Reports**.

See also

- *Viewing Reports and Editing Report Criteria* on page 54
- *Creating a Pipeline Report* on page 54
- *Creating a Top Opportunities Report* on page 55
- *Creating a Top Sales Order Report* on page 57
- *Report Types* on page 53

Creating a Top Sales Order Report

Create a top sales order report.

1. On the home screen, select **Analytics**.
2. Select **Menu > Create Top Sales Order Report**.
3. Indicate the report details.

Table 7. Top Sales Order report details

Option	Description
Name	Enter a name for the report.
Status	Select the sales order status.
Period	Select the period: **Previous**, **Current**, **Next**, or **None**.
Timeframe	Select the timeframe: **Monthly**, **Quarterly**, or **None**.
Posting Date	Select a date on the calendar, or **None**.
Sales Rep	If you are a manager, you can indicate a sales representative or all representatives.

Option	Description
Number Of Sales Orders	Select number of sales orders to display.
Sort By	Select **Net Value** or **Default**.
Sort Order	Select **Ascending** or **Descending**.

4. Select **Save**.

This report is now available in **My Reports**.

See also

- *Viewing Reports and Editing Report Criteria* on page 54
- *Creating a Pipeline Report* on page 54
- *Creating a Top Opportunities Report* on page 55
- *Creating a Top Risk Opportunities Report* on page 56
- *Report Types* on page 53

CHAPTER 9 Sales Documents

Sales documents include sales orders, services orders, quotations, and contracts.

You can view all sales documents, or view sales documents associated with an account or contact, using these methods:

Method	Description
Sales Documents	**1.** Select **Sales Documents**. **2.** Select a sales document to view its details.
Accounts	**1.** Select **Accounts**. **2.** Select an account to view its fact sheet. **3.** Near the bottom of the screen, select **Sales Documents**. **4.** Select the sales document to view its details.
Contacts	**1.** Select **Contacts**. **2.** Select a contact to view its fact sheet. **3.** Near the bottom of the screen, select **Sales Documents**. **4.** Select the sales document to view its details.

See also

- *Chapter 2, Searching* on page 13
- *Chapter 3, Account Management* on page 17
- *Chapter 4, Contacts Management* on page 27
- *Chapter 5, Activity Management* on page 37
- *Chapter 6, Lead Management* on page 43
- *Chapter 7, Opportunity Management* on page 49
- *Chapter 8, Analytics* on page 53

Searching Sales Documents

Search to find and view a sales document.

1. Select **Sales Documents**.
2. Search for the sales document.

You can also perform an advanced search or create an online lookup.

To	Do this
View recent sales document	• (Windows Mobile Professional) Select **Filter By > Recent Items**. • (Windows Mobile Standard) Select **Menu > Show > Recent**.
Sort the sales documents	You can sort sales documents by **Name**, **Date**, **Type**, or **Status**. • (Windows Mobile Professional) Select **Sort By**. • (Windows Mobile Standard) Select **Menu > Sort By**.

CHAPTER 10 Device Data Integration With Mobile Sales

You can integrate some of your personal data with the the Mobile Sales data (PIM integration).

You can also:

- Log a calendar entry as a Mobile Sales activity.
- Log an e-mail as a Mobiles Sales activity.
- Log a phone call as a Mobile Sales activity.
- View new activities, leads, and opportunities in your Notifications messaging folder.

Adding a Personal Contact to Mobile Sales

You can manually add a personal contact to the Mobile Sales application, if the Mobile Sales application is configured to synchronize these items manually.

When configuring the Mobile Sales application, your system administrator determines how personal contacts synchronize with the Mobile Sales contacts: automatic, manual, or none. If automatic, native contacts automatically become Mobile Sales contacts, and Mobile Sales contacts automatically become native contacts. If none, you cannot synchronize native contacts and Mobile Sales contacts.

If manual, follow these steps to save a native contact as a CRM contact. Once the personal contact is also a CRM contact, any changes made to the contact in one place get automatically updated in the other.

1. Open a personal contact to view contact details.
2. Select **Menu** > **Add Contact to CRM**.

   The Mobile Sales application opens the contact in edit mode.
3. Associate this contact with an account, then select **Next**.
4. (Optional) Edit the contact's alternate contact information, then select **Save**.

See also

- *Adding a Calendar Entry as a Mobiles Sales Activity* on page 62

Adding a Calendar Entry as a Mobiles Sales Activity

Manually log a calendar entry as a Mobile Sales activity, if the Mobile Sales application is configured to synchronize these items manually.

When configuring the Mobile Sales application, your system administrator determines how calendar entries synchronize with the Mobile Sales application: automatic, manual, or none. If automatic, native calendar entries automatically become Mobile Sales activities, and Mobile Sales activities (appointments, meetings) automatically become calendar entries. If none, you cannot synchronize calendar entries and Mobile Sales activities.

If manual, follow these steps to save a native calendar entry as a CRM activity.

1. Select a calendar entry in your personal calendar to open it.
2. Select **Menu > Log as Activity**.

   The Mobiles Sales application opens the **Edit Activity** screen.
3. Add the **Activity Partner** and **Contact Person**.
4. Add or edit any other applicable activity details.
5. Select **Save**.

   The activity is added to the activities list.

See also

- *Adding a Personal Contact to Mobile Sales* on page 61

CHAPTER 11 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.

Uninstall the programs in the specified order.

1. Select **Start > Programs > Settings**.
2. Select **Remove Programs**.

   (Windows Mobile Professional) Remove Programs is in the System tab.
3. Remove **Sybase Mobile Sales**.
4. Remove **Sybase Message - SUPObj**.

   Follow the onscreen prompts to restart the device. Once your device restarts, you might have to navigate back to Remove Programs.
5. Remove **Sybase Messaging**.
6. Select **Done**.
7. Delete the Mobile Sales folder to make sure no installation artifacts remain.
   a) Open File Explorer.
   b) In the **Program Files** folder, delete the **Mobile Sales** folder.

See also

- *Supported Devices* on page 3
- *Installation Prerequisites* on page 3
- *Installing Mobile Sales on Your Windows Mobile Device* on page 5
- *Chapter 12, Troubleshooting* on page 65

CHAPTER 12 Troubleshooting

Determine the cause of problems and apply the recommended solution.

Online Lookup Returns No Data

Issue: The system can only return a maximum of 1MB of data, so broad searches may return only a subset of the data or return no data. Your company determines the maximum allowable data when configuring your SAP system.

Workaround: To ensure you see the all results you want, limit the data set by indicating additional search parameters.

Password Error During Synchronizaton

Issue: If you changed your device password but did not have your company change it first on the SAP server, you will get an error during synchronization.

Workaround: Select **Menu** > **Options** > **Change Password** to change it back to previous password.

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.

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.

Search on Item Description Hangs Application

Issue: When adding a new item to a lead, if you attempt to search on the description using an online lookup, and do not have network connectivity, the Mobile Sales application hangs until you have a network connection.

Workaround: To continue working offline, cancel the search.

Start and End Times for Advanced Search Must Be Exact Matches

Issue: When performing an advanced search, the dates you indicate for the Start Time and End Time reflect the exact date when the activity or opportunity started and ended, meaning, the search will only find records for objects with that exact start date and end date. It does not act as a date range and return records between those two dates.

Workaround: None.

Receive Error When Starting Mobile Sales While Receiving Data

Issue: If you try to start a new installation of Mobile Sales while you are receiving data, the system generates a SQLiteException error.

Workaround: Contact your system administrator to remove the pending messages on Unwired Server so you can resubscribe (log in).

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.

Maximum Allowed Login Attempts Exceeded

Issue: If you have tried to log in but have entered the wrong login information and received several Password Is Invalid errors, the application displays `Maximum Login Attempts Exceeded!`.

Workaround: Contact your system adminstrator for instructions on how to reset the maximum login attempts configuration setting.

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.

Device Is Toggling Between Connected and Disconnected

Issue: Sybase Settings log shows that device is toggling between Connected and Disconnected.

Workaround: None. No action necessary. Application response may be slow.

See also

- *Supported Devices* on page 3
- *Installation Prerequisites* on page 3
- *Installing Mobile Sales on Your Windows Mobile Device* on page 5
- *Chapter 11, Uninstalling the Mobile Sales Application* on page 63
- *Changing Your Password* on page 9

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