



Device User Guide

Sybase Mobile Sales for SAP®

CRM 1.1

Windows Mobile

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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.

With Mobile Sales, you have 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

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

Device Storage Requirements

Make sure you have the minimum free storage space before installing the Mobile Sales application on the device: 40MB internal storage. You may need more storage space depending on how much data you store on the device.

See also

- *Installation Prerequisites* on page 2
- *Installing Mobile Sales on Your Windows Mobile Device* on page 4

Supported Languages

Mobile Sales labels and messages display in these supported languages.

- English
- French
- German
- Spanish

Live Mode

If your device is set to a supported language, Mobile Sales labels and messages automatically display in that language. If your device is set to an unsupported language, the Mobile Sales default language is English; however, you can change to a different supported language after login.

Demo Mode

If running Mobile Sales in Demo mode, the Mobile Sales data displays in English while the application labels and messages display in the selected supported language, or English for unsupported languages.

SAP System Messages and Field Names

Many SAP messages and field names are translated to your device's native language. However, in some cases, the 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.

Installation Prerequisites

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

- Uninstall any existing version of Mobile Sales before installing a newer version.

- 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.

Be sure to 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.

- 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. Without this file, Mobile Sales might not display some localized messages.

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

- *Installing Mobile Sales on Your Windows Mobile Device* on page 4
- *Device Requirements* on page 1

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

Perform the required installation prerequisites.

Task

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. Copy the Sybase Messaging CAB file to your device.

Use File Explorer to find the CAB file on the device, then select the CAB file to begin the installation process.

- SUPMessaging_ppc.cab for Windows Mobile Professional
- SUPMessaging_sp.cab for Windows Mobile Standard

2. Copy the Mobile Sales application CAB to your device, and then select it to install.

- SybaseMobileSales_Pro_<version>.CAB for Windows Mobile Professional
- SybaseMobileSales_Std_<version>.CAB for Windows Mobile Standard

3. Select **OK** as many times as required to complete the installation process.

Next

- If running Mobile Sales in Live mode, specify the connection settings in Sybase Settings before starting the application.
- If you are evaluating the Mobile Sales application, run it in Demo mode, which contains sample data. You do not need to connect to the SAP system.

See also

- *Installation Prerequisites* on page 2
- *Device Requirements* on page 1
- *Upgrading* on page 5

Upgrading

Before you can install a newer version of Mobile Sales, you must uninstall the existing version.

1. Uninstall Mobile Sales. See *Uninstalling the Mobile Sales Application*.
2. Once you uninstall the existing version of Mobile Sales, see *Installing Mobile Sales on Your Windows Mobile Device*.

See also

- *Installing Mobile Sales on Your Windows Mobile Device* on page 4
- *Chapter 14, Uninstalling Mobile Sales* on page 65

Connection Settings

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

Enter Sybase Settings

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

Note: You do not need to enter connection settings if running Mobile Sales in Demo mode.

From the home page, select **Start > Programs > Sybase Settings**.

Table 1. Connection information

Option	Description
Server Name	Host name or IP address of Relay Server or Unwired Server.
Server Port	Message 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.

Verify Connection to SAP System

In Sybase Settings, select **Menu > Show Log**. Look for the Connected to Server message.

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

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 the Mobile Sales application.
- Be sure you have at least 20MB free process memory. If you do not have enough free memory, shut down other applications that you are not currently using.

Task

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

If your device is set to a supported language, the Mobile Sales application messages and labels display in the supported language specified for the device. If your device is set to an unsupported language, the Mobile Sales default language is English; however, you can select a different supported language for Mobile Sales after you log in.

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, 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. 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, verify your connection information is correct and that you are connected to the SAP system by viewing the Sybase Settings log.

Running Mobile Sales in Demo Mode

You can run Mobile Sales in Demo mode for evaluation purposes. Demo mode does not require you to 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

displays in English while the application labels and messages display in the selected supported language, or English for unsupported languages.

Your system administrator determines if the Mobile Sales application can run in Demo mode.

1. Select **Start > Programs > Mobile Sales**.
2. In the pop-up dialog, select **Yes** to **Do You Want to Start in Demo Mode?**.

If you select **No**, Mobile Sales assumes that you want to run the application in "Live" (online) mode. The Demo mode option becomes unavailable. This pop-up displays only the first time you start Mobile Sales.

3. Enter any **User ID** and **Password**, then select **Login**.

Note: Be sure to note the specified user ID and password because Mobile Sales requires that you use the same credentials for subsequent logins.

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.

Prerequisites

- Indicate Sybase Settings connection information.
- View the Sybase Settings log to make sure Mobile Sales is connected to the SAP system.

Task

1. Exit the Mobile Sales application.
2. Start the Mobile Sales application.
3. In the Login screen, select **Menu > Unsubscribe**.
4. Select **No** in the pop-up dialog, **Do You Wish to Continue in Demo Mode?**.
5. Log in using your SAP user ID and password.

Next

Start Sybase Mobile Sales.

See also

- *Chapter 2, Starting Sybase Mobile Sales* on page 7

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.

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.

Mobile Sales 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 – lists your Mobile Sales accounts.
- Contacts – lists your Mobile Sales contacts.
- Activities – lists your Mobile Sales activities.
- Leads – lists your Mobile Sales leads.
- Opportunities – lists your Mobile Sales opportunities.
- Analytics – lists the available Mobile Sales reports.
- 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 Indicators

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

For opportunities, the SAP server calculates their chance of success and displays an icon indicating the chance-of-success percentage with each opportunity.

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

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

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

Table 2. 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 manually 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.

See also

- *Chapter 15, Troubleshooting* on page 67

Mobile Sales Synchronization

After you initially connect to the SAP server and download CRM data, you can work online or offline. To begin using Mobile 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**.

Unsubscribing and Resubscribing to Mobile Sales

Your system administrator may ask you to unsubscribe 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:

- 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 and Settings

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 Mobile 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 in the contacts list.
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.
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 <i>n</i> 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 <i>n</i> 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

- *Viewing Notifications* on page 16

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 changing it on the device using this screen.

Task

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

- *Chapter 15, Troubleshooting* on page 67

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.

To	Do this
Hide the field	Select Menu > Hide Item .
Move the field up	Select Menu > Move Up .
Move the field down	Select Menu > Move Down .

To	Do this
Display a hidden field	<ol style="list-style-type: none"> 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**.

Notifications

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

You can view your notifications, delete an individual notification, or clear all notifications. 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 and is connected to the SAP system.

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 16
- *Settings* on page 14

Deleting and Clearing Notifications

Delete an individual notification, or clear all notifications.

1. Go to your Notifications messaging account.
2. Delete a notification or clear all notifications.

To	Do this
Delete a notification	Select the notification to delete, then select Delete .
Clear all notifications	Select Menu > Select Messages > All , then select Delete .
Delete multiple notifications	<ul style="list-style-type: none"> • (Windows Mobile Professional) Select Menu > Select Messages > Several, select to highlight the appropriate notifications, then select Delete. • (Windows Mobile Standard – contiguous messages) . Select Menu > Select Messages > Several, highlight the first notification, select the Down or Up arrow key until you highlight the appropriate notifications, then select Delete.
Delete a notification and all notifications below it	Select the notification, then Menu > Select Messages > All Below , then select Delete .

See also

- *Viewing Notifications* on page 16

CHAPTER 4 **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	Enables you to search your device data for a record in a list. You can enter 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 perform an online lookup for all objects except contacts.

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 20
- *Deleting an Online Search* on page 20

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 as the wildcard, 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 19
- *Deleting an Online Search* on page 20

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 19
- *Searching Using Online Lookup* on page 20

CHAPTER 5 **Maps**

Mobile Sales supports different map options for your smartphone.

For Windows Mobile, Mobile Sales integrates with Google Maps mapping service. Your organization must obtain a map key from Google to use this service.

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. 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.

CHAPTER 6 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.
- Create new accounts.
- Update account information.
- Quickly contact an account: send an e-mail or place a call to the account main number or mobile number, all from the account fact sheet.
- Capture, monitor, and track critical information about prospects, customers, and partners.

See also

- *Chapter 7, Contacts Management* on page 33
- *Chapter 8, Activity Management* on page 39
- *Chapter 9, Lead Management* on page 45
- *Chapter 10, Opportunity Management* on page 51

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	<ul style="list-style-type: none">• (Windows Mobile Professional) Select Filter By > Recent.• (Windows Mobile Standard) Select Menu > Show > Recent.

To	Do this
Sort the accounts	<ul style="list-style-type: none"> • (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.

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.

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.

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.

Option	Description
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.

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.

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.

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 . . <ul style="list-style-type: none"> • (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.

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.

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 14.

Task

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

- *Logging a Phone Call as an Activity* on page 41

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

- *Logging an E-mail as an Activity* on page 42

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**.

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**.

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**.

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.

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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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 31

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 31

CHAPTER 7 **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.
- Update contact information.
- Create a new contact.
- Quickly contact your contact: send an e-mail or place a call to the account main or mobile number, all from the contact fact sheet.

See also

- *Chapter 6, Account Management* on page 25
- *Chapter 8, Activity Management* on page 39
- *Chapter 9, Lead Management* on page 45
- *Chapter 10, Opportunity Management* on page 51

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	<ul style="list-style-type: none">• (Windows Mobile Professional) Select Filter By > Recent Items.• (Windows Mobile Standard) Select Menu > Show > Recent.
Sort the contacts by company	<ul style="list-style-type: none">• (Windows Mobile Professional) Select Sort By > Company.• (Windows Mobile Standard) Select Menu > Sort By > Company.

3. Select the contact to view.

Viewing Contacts

View existing contacts.

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

To	Do this
View contact details	Select the contact.
View recently viewed contacts	<ul style="list-style-type: none"> • (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.

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.

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.

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.

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.

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.

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.

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 14.

Task

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 application 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

- *Logging a Phone Call as an Activity* on page 41

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

- *Logging an E-mail as an Activity* on page 42

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.

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 31

Saving a CRM Contact as a Personal Contact

Save a CRM business contact as a personal contact.

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**.

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**.

Manage your schedule and activities from your mobile device. All information is seamlessly 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 using Mobile Sales or the native calendar.
- Increase visibility into activities and customers by logging e-mails and phone calls as CRM activities.
- Search, view, and create activities, as well as accounts and contacts associated with an activity.
- Log phone calls by creating CRM activities. If you selected **Log Phone Call** in Settings, a dialog appears if you dialed an account or a contact phone number. If you select **Yes** to log the call, Mobile Sales launches the Create Outgoing Call activity screen.
- Log e-mail messages by creating CRM activities. 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.

See also

- *Chapter 6, Account Management* on page 25
- *Chapter 7, Contacts Management* on page 33
- *Chapter 9, Lead Management* on page 45
- *Chapter 10, Opportunity Management* on page 51

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.

To	Do this
Filter by activity type, or view recent activities	<ul style="list-style-type: none"> • (Windows Mobile Professional) Select Filter By, then the activity type. • (Windows Mobile Standard) Select Menu > Show, then the activity type.
Sort the activities	<p>You can sort by Date, Type, Name, or Status.</p> <ul style="list-style-type: none"> • (Windows Mobile Professional) Select Sort By. • (Windows Mobile Standard) Select Menu > Sort By.

3. Select the activity to view its fact sheet.

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.

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**.

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, a dialog appears if you dialed an account or a contact phone number. If you select **Yes** to log the call, Mobile Sales launches the Create Outgoing Call activity screen.

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

- *Calling the Account Phone Number* on page 28
- *Calling a Contact* on page 36

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

- *E-mailing an Account* on page 29
- *E-mailing a Contact* on page 36

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 9 **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, contacts, and potential orders and sales with a lead.

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 6, Account Management* on page 25
- *Chapter 7, Contacts Management* on page 33
- *Chapter 8, Activity Management* on page 39
- *Chapter 10, Opportunity Management* on page 51

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	<ul style="list-style-type: none">• (Windows Mobile Professional) Select Filter By > Recent Items.• (Windows Mobile Standard) Select Menu > Show > Recent.

To	Do this
Sort the leads	<p>You can sort leads by Name, Date, or Status.</p> <ul style="list-style-type: none"> • (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 46
- *Updating Lead Details* on page 47

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 45
- *Updating Lead Details* on page 47

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 45
- *Creating a New Lead* on page 46

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 48
- *Adding a New Item to a Lead* on page 48

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 47
- *Adding a New Item to a Lead* on page 48

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 47
- *Editing an Item for a Lead* on page 48

CHAPTER 10 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, contacts, and potential orders and sales with an opportunity.

See also

- *Chapter 6, Account Management* on page 25
- *Chapter 7, Contacts Management* on page 33
- *Chapter 8, Activity Management* on page 39
- *Chapter 9, Lead Management* on page 45

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	<ul style="list-style-type: none">• (Windows Mobile Professional) Select Filter By > Recent Items.• (Windows Mobile Standard) Select Menu > Show > Recent.
Sort the opportunities	<p>You can sort opportunities by Name, Date, Chance, or Status.</p> <ul style="list-style-type: none">• (Windows Mobile Professional) Select Sort By.• (Windows Mobile Standard) Select Menu > Sort By.

See also

- *Updating Opportunity Details* on page 52
- *Creating an Opportunity* on page 52
- *Adding a New Line Item to an Opportunity* on page 53
- *Updating an Opportunity Line Item* on page 54

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 51
- *Creating an Opportunity* on page 52
- *Adding a New Line Item to an Opportunity* on page 53
- *Updating an Opportunity Line Item* on page 54

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 51
- *Updating Opportunity Details* on page 52
- *Adding a New Line Item to an Opportunity* on page 53
- *Updating an Opportunity Line Item* on page 54

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 51
- *Updating Opportunity Details* on page 52
- *Creating an Opportunity* on page 52
- *Updating an Opportunity Line Item* on page 54

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 51
- *Updating Opportunity Details* on page 52
- *Creating an Opportunity* on page 52
- *Adding a New Line Item to an Opportunity* on page 53

CHAPTER 11 **Analytics**

Review charts and key reports, based on realtime 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.

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.

Report Display Formats

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

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 as a new name, it appears in My Reports.

Select the report to view it, select **Menu > Edit**, change the desired report options, select **Menu > Save As**, then enter a report name.

Delete Saved Reports

You can delete any report saved in My Reports.

Highlight the report and select **Menu > Delete**.

Refresh User Position

The SAP system maintains your position within the sales organization. If your position changes, you need to refresh your user position for the Mobile Sales application. For example, if you get promoted to Sales Manager, you can run Pipeline Analysis reports for you or your sales representatives. To refresh the user position, select **Analytics**, then **Menu > Refresh User Position**.

Pipeline Report

Provides a realtime 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. If you are running this report for the first time, select your user position. You can edit the report options and save them as the default report, or save this report to a user-defined name in My Reports.

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

The Pipeline Analysis report is a bar chart that, by default, displays the won and expected sales revenues per month for a three-month period.

Table 4. Pipeline report details

Option	Description
Name	Enter a name for the report.
Period	Select the period: Monthly or Quarterly .
Weighting	Calculates weighted revenue based on the opportunities' 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.

Top Opportunities Report

Generates a realtime 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 to 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 Top Opportunities report is a column chart that, by default, displays top sales prospects and their expected revenues by closing date.

Options appear in alphabetical order.

Table 5. 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 .
Name	Enter a name for the report.
# Of Opportunities	Select number of opportunities to display.
Period	Select the period: Previous , Current , Next , or None . Select None if specifying a closing date.
Sales Rep	If you are a manager, you can indicate a sales representative or all representatives.
Sort By	Select Closing Date or Expected Revenue .
Sort Order	Select Ascending or Descending .
Status	Select the sales order status.
Time Frame	Select the time frame: Monthly , Quarterly , or None . Select None if specifying a closing date.

Top Risk Opportunities Report

Generates a realtime risk opportunity report.

Select **Analytics** from the home screen, then select **Top Risk 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 to 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 Top Risk Opportunities report is a column chart that, by default, displays the sales prospects at risk by expected revenue.

Options appear in alphabetical order.

Table 6. Top Risk Opportunity report details

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

Top Sales Order Report

Generates a realtime report of your top sales orders.

Select **Analytics** from the home screen, then select **Top Sales Order** 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 to a user-defined name in My Reports.

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 .

CHAPTER 12 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	<ol style="list-style-type: none">1. Select Sales Documents.2. Select a sales document to view its details.
Accounts	<ol style="list-style-type: none">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	<ol style="list-style-type: none">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.

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	<ul style="list-style-type: none">• (Windows Mobile Professional) Select Filter By > Recent Items.• (Windows Mobile Standard) Select Menu > Show > Recent.

To	Do this
Sort the sales documents	<p>You can sort sales documents by Name, Date, Type, or Status.</p> <ul style="list-style-type: none">• (Windows Mobile Professional) Select Sort By.• (Windows Mobile Standard) Select Menu > Sort By.

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

When configuring the Mobile Sales application, your system administrator determines how personal contacts and calendar entries synchronize with the Mobile Sales contacts and activities: automatic, manual, or none.

Data	Description
Contacts	<ul style="list-style-type: none"> • If automatic, native contacts automatically become Mobile Sales contacts, and Mobile Sales contacts automatically become native contacts. • If manual, you must specifically indicate which contacts to synchronize. • If none, you cannot synchronize native contacts and Mobile Sales contacts.
CRM activities and calendar entries	<ul style="list-style-type: none"> • If automatic, native calendar entries automatically become Mobile Sales activities, and Mobile Sales activities (appointments, meetings) automatically become calendar entries. • If manual, you must specifically indicate which CRM activities or native calendar entries to synchronize. • If none, you cannot synchronize calendar entries and Mobile Sales activities.

Once a contact or activity is integrated, regardless of PIM integration method, Mobile Sales automatically synchronizes the data if you make any changes. If you update the data and the

SAP server rejects the changes because of errors, Mobile Sales does not perform the synchronization until you fix the errors and the SAP system accepts the changes.

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.

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 64

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.

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 64

CHAPTER 14 **Uninstalling Mobile Sales**

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

Uninstall the previous version of the Mobile Sales application before installing a newer version.

1. Exit the Mobile Sales application.
2. Select **Start > Programs > Settings**.
3. Select **Remove Programs**.

(Windows Mobile Professional) Remove Programs is in the System tab. Uninstall the programs in the specified order.

4. Remove **Sybase Mobile Sales**.
5. Remove **Sybase Messaging**.

Follow the onscreen prompts to restart the device. Once your device restarts, you might have to navigate back to Remove Programs.

6. Select **Done**.
7. Verify that the uninstaller removed 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 if it exists.

See also

- *Upgrading* on page 5

CHAPTER 15 **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.

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.

Solution: 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.

Solution: 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.

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.

Rejected Record Must Be Fixed on Device

Issue: If the SAP system rejects a record or the record contains an error on your device, another Mobile Sales user or your system administrator cannot fix the error or update the object while it is in an error state.

Solution: Fix the record or object on your device.

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.

Solution: 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.

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!.

Solution: Contact your system administrator 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 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 your 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."

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.

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

See also

- *Changing Your Password* on page 15
- *Data Status Indicators* on page 11

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