



Device Users Guide

**Sybase Mobile Sales for SAP
CRM 1.2**

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.

Mobile Sales gives you full access to the specific SAP CRM data you need: accounts, contacts, leads, opportunities, activities, and analytics. Much of the functionality of your native device integrates with Mobile Sales. You can work connected to the SAP server, or offline, when you do not have an Internet connection.

With Mobile Sales, you can:

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

Device Requirements

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

Supported Devices

- 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

Verify that your smartphone has adequate device storage space.

Mobile Sales requires 40 MB free storage space for the out-of-the-box (non-customized) application.

Supported Languages

Mobile Sales labels and messages appear in several supported languages.

- English
- French
- German
- Spanish

Live Mode

If your device is set to a supported language, Mobile Sales labels and messages automatically appear in that language. If your device is set to an unsupported language, the Mobile Sales default language is English.

Demo Mode

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

SAP System Messages

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

Installation Prerequisites

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

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

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

- Create a messaging folder called Notifications.
- Install Microsoft Compact Framework 3.5, `NETCFSetupv35.msi`, which 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`, to view Windows Mobile error messages for a specific locale. Without this file, Mobile Sales might only 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.

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 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. Enter Notifications as your name.

Enter it exactly as indicated here, capitalizing Notifications.

7. Enter Notifications again as the account display name, 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 messages.

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.

Note: If reinstalling Mobile Sales, your system administrator may indicate which CAB files to install. For first-time installations, install both the Sybase Messaging and Mobile Sales application CAB files.

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_Pro.cab for Windows Mobile Professional
- SUPMessaging_Std.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 you are 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 need not connect to the SAP system.

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

Enter Sybase Settings

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

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

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	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 Server

The Sybase Settings log indicates if you are successfully connected to the server. Look for the *Connected to Server* message. If this message does not display within 5 minutes, restart the client in Sybase Settings.

To view the log:

In Sybase Settings, select **Menu > Show Log**.

See also

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

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

Prerequisites

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

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

Task

1. Select **Start > Programs > Mobile Sales**.
2. If starting Mobile Sales for the first time, select **No** to **Do You Want to Start in Demo Mode?**

This pop-up appears only the first time you start Mobile Sales.

If you select **Yes**, the application runs in Demo mode. If you selected **Yes** in error and need to launch Mobile Sales in Live mode, you can switch from Demo mode to Live mode.

3. Enter the SAP account and password.

The Mobile Sales application begins synchronizing data with the SAP system. It can take up to 30 minutes or longer to perform the initial synchronization with the SAP system, depending on the data set size for your subscription. The application home page appears after synchronization. The application splash screen shows the synchronization status and the types of data that is being downloaded to the device.

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

See also

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

Running Mobile Sales in Demo Mode

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

When you run in Demo mode, Mobile Sales creates test data. If you update any existing data or create new data, those changes are marked as pending. In Demo mode, the Mobile Sales data appears in English while the application labels and messages appear in the selected supported language, 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. Select **Yes** to **Do You Want to Start in Demo Mode?**

This pop-up appears only the first time you start Mobile Sales.

If you select **No**, the application runs in Live (online) mode. The Demo mode option becomes unavailable. If you selected **No** in error and need to launch Mobile Sales in Demo mode, contact your system administrator for assistance.

3. Enter any user ID and password, then select **Login**.

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

See also

- *Chapter 4, Starting Sybase Mobile Sales* on page 9
- *Switching from Demo Mode to Live Mode* on page 10

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. If you are currently running the Mobile Sales application in Demo mode, exit the application.

2. Start the Mobile Sales application.
3. On 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.

See also

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

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.

- Some of the functionality of the Mobile Sales application is determined by the locale and language of where the SAP system resides.
- Some device messages appear in the SAP system language rather than the device language.








Mobile Sales Home Screen


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

Home Screen Icons

Your system administrator determines the components (facets) you see, which might include:

Table 2. Mobile Sales Home Screen Icons

Mobile Sales icon	Description
	Accounts. Displays a list of your Mobile Sales accounts.
	Contacts. Displays a list of your Mobile Sales contacts.
	Activities. Displays a list of all your Mobile Sales activities.
	Leads. Displays a list of your Mobile Sales leads.
	Opportunities. Displays a list of your Mobile Sales opportunities.
	Sales Documents. Displays a list of your sales orders.
	Analytics. Displays a list of the reports you can run to view real-time sales data from the SAP system.

Mobile Sales icon	Description
	<p>Recents. (Windows Mobile Professional) Displays the recently viewed items for accounts, contacts, activities, leads, and opportunities. Use Mobile Sales Settings to change how many recent items appear for each object.</p> <hr/> <p>Note: For Windows Mobile Standard, select Recent Items at the top of the home screen.</p> <hr/>

Today's Activities

Today's Activities lists all activities for today. Select an activity from this view to view its fact sheet.

Getting Back Home

- (Windows Mobile Professional) From the Mobile Sales drop-down menu, select **Home**.
- (Window Mobile Standard) Select **Menu > Home**.

Mobile Sales Version

From the Mobile Sales home screen menu, select **Menu > About**.

See also

- *Settings* on page 18
- *Notifications* on page 17

Data Status Indicators

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




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

When you create a new object or modify an existing one, the changes are placed in a pending state and wait for the SAP server to accept the changes. Until accepted by the SAP server, the changes are stored only in the device database. The SAP server replies in one of three ways:

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

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

Table 3. Data Status Icons

Icon	Description
	Pending changes. If you are working offline, any new or updated information goes into a queue until the device goes online. The Mobile Sales application tags information in the queue with a Pending Changes icon. You cannot edit an object with pending changes.
	<p>Yellow triangle indicator – warning messages associated with the data. You can ignore the messages or manually fix them. If you do not make the required edits to fix the warning, the warning remains. 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.</p> <hr/> <p>Note: If a contact contains warning messages, the warning messages also appear on the account associated with the contact and all contacts associated with that account.</p>
	<p>Red error icon – the SAP server has rejected the new or updated object. You must fix or undo the changes to clear the error. View error messages in the object's fact sheet. Select the message to view its details. To undo the changes, select Menu > Undo Changes, or fix the errors by editing the object, then save it.</p> <p>If a record is rejected because of incorrect login information, the application displays a window in which to enter your correct password. After you enter the correct login information, you must manually edit the affected record again and save it.</p>

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 you create new or update 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 from Mobile Sales

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

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

When you unsubscribe:

- Do not make any changes to your connection information in Sybase Settings, or the unsubscribe fails and you will need to contact your system administrator to delete your subscription.
 - You must have network connectivity. If you are offline when you unsubscribe, the unsubscription occurs once you have network connectivity.
 - Any pending updates are pushed to the SAP server.
 - Pending edits that have not been synchronized with the SAP server are canceled.
 - Any pending changes from the SAP server to your device are ignored.
1. Exit the Mobile Sales application.
 2. Start the Mobile Sales application.
 3. On the login screen, select **Menu > Unsubscribe**.
 4. Confirm that you want to unsubscribe.
 - If you are running Mobile Sales in Demo mode, indicate whether to continue in Demo mode. If you select **No**, you must enter connection settings in Sybase Settings before resubscribing to Mobile Sales.
 - If you are running Mobile Sales in Live mode, log in to resubscribe.

Changing Your Password

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

Prerequisites

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

Task

1. 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 SAP system validates the password.

Notifications

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

You can view your notifications, delete an individual notification, or clear all notifications. Notifications appear in descending date order, with the most recent on top.

See also

- *Mobile Sales Home Screen* on page 13

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 e-mail message 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 17

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, 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 17

Personalization and Settings

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

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

You can determine default application behavior, change your password, or personalize 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**.

Table 4. Mobile Sales Settings

Option	Description
Show Last Name First	Displays last name first for contacts in the contacts list.
Log Phone Call	<p>If you dial an account or a contact phone number, Mobile Sales displays a pop-up so you can log the outgoing phone call as a Mobile Sales activity.</p> <p>If you want to log a received call as a CRM activity, you must manually create an activity of the type Incoming Call.</p>
Recent Items Display	Indicates how many recent items to show for accounts, contacts, activities, leads, opportunities, and sales documents.
Default Lead Duration (Days)	<p>Indicates the default duration for newly created leads. The default is 30 days.</p> <p>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.</p>
Default Opportunity Duration (Days)	<p>Indicates the default duration for newly created opportunities. The default is 30 days.</p> <p>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.</p>
Application Timeout (Minutes)	Indicates the number of 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

- *Mobile Sales Home Screen* on page 13

Personalizing a Fact Sheet

Customize a fact sheet by indicating which fields you see and in what order. You can personalize 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 its 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.
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.**

CHAPTER 6 **Searching**

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

Search type	Description
Search	Search your device data for a record in a list. Enter a text string to filter the results you see. You see results for any field in the list.
Advanced search	An advanced search enables you to further narrow your search for device data by indicating a text string or selecting specific values from a list 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.

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 list to indicate search criteria.

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

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. Online lookup searches are automatically saved.

When you perform a search, the results may display records that, at first, appear to be unrelated to your search. The results returned from the SAP CRM backend system search are actually the records that match, plus additional records that are related to the matching records.

Note: Broad searches may return only a subset of the data or return no data. To ensure you see the all results you want, indicate additional search parameters to limit the data set.

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 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.

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**.

CHAPTER 7 **Maps**

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**.

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

With Mobile Sales Account Management, you can:

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

View Accounts

View the complete list of CRM accounts.

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

- Narrow the list results.
Enter a text string to narrow and display the results.
- Display a list of recently viewed accounts.
- Sort the account list by name, city, or state.
- Select an account to view its fact sheet.

Create an Account

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

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

When creating an account:

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

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

See also

- *Data Status Indicators* on page 14

Inspect Account Details

View an account fact sheet, which displays account details.

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

From the account fact sheet, you can:

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

Edit Account Details

You can edit the details for an account.

Once you display the account fact sheet, select **Edit** for Windows Mobile Professional, or **Menu > Edit Account** for Windows Mobile Standard.

From the Edit Account screen, you can:

- Modify address and contact information.
- Add or edit the notes associated with the account.

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

Manage your Sybase Mobile Sales for SAP CRM contacts.

With Mobile Sales Contacts Management, you can:

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

View Contacts

View the complete list of Mobile Sales contacts.

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

- Narrow the list results.
Enter a text string to narrow and display the results.
- Display a list of recently viewed contacts.
- Sort the contact list by company.
- Select a contact to view its fact sheet.

Create a Contact

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

When creating a Mobile Sales contact:

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

See also

- *Data Status Indicators* on page 14

Inspect Contact Details

View a contact fact sheet, which displays contact details.

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

From the contact fact sheet, you can:

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

Edit Contact Details

You can edit the details for a contact.

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

From the Edit Contact screen, you can:

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

The contact has pending changes until the device data is synchronized with the SAP system. If the SAP system rejects the changes, you receive a rejection or an error message. If the SAP system accepts the update or new object, you may receive a warning message if a minor data fix is required. Sybase recommends that you fix or undo the changes.

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

CHAPTER 10 **Activity Management**

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

With Mobile Sales Activity Management, you can:

- Quickly access, create and modify planned activities.
- Increase visibility into customer interactions by logging e-mail messages and phone calls as CRM activities.
- Add Mobile Sales activities to your native calendar. Your system administrator determines which activity type you can save to your native calendar.
- Search, view, and create activities, as well as view or add accounts and contacts associated with an activity.

View Activities

View your Mobile Sales activities.

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

- Narrow the list results.
Enter a text string to narrow and display the results.
- Select an activity to view its fact sheet.
- View only today's activities or recent activities.
- Sort by **Date**, **Type**, **Name**, or **Status**.

Create an Activity

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

When creating an activity:

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

- You can create a Mobile Sales activity for an outgoing phone call. 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.
- You can create a Mobile Sales activity from an e-mail message. Open the e-mail message in the Inbox or Outbox, then select **Menu > Create As Activity**. The e-mail message text is stored in the notes for the new activity.
- (Windows Mobile Professional) Click the Down arrow to select start and end dates for an activity.

See also

- *Data Status Indicators* on page 14

Inspect Activity Details

View the activity fact sheet.

From the fact sheet, you can:

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

Edit Activity Details

Edit an activity's details.

Once you display the fact sheet, select **Menu > Edit Activity**.

From the Edit Activity screen, you can:

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

CHAPTER 11 **Lead Management**

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

With Mobile Sales Lead Management, you can:

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

View Leads

View your current, past, and future leads.

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

- Narrow the list results.
Enter a text string to narrow and display the results.
- Select a lead to view its fact sheet.
- View only recent leads.
- Create a new lead.

Create a Lead

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

When creating a lead:

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

See also

- *Data Status Indicators* on page 14

Inspect Lead Details

View the lead fact sheet to display lead details.

From the lead fact sheet, you can:

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

Edit Lead Details

Edit the details for a lead.

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

From the Edit Lead screen, you can:

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

CHAPTER 12 **Opportunity Management**

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

With Mobile Sales Opportunity Management, you can:

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

View Opportunities

View your past, current, and future opportunities.

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

- Narrow the list results.
Enter a text string to narrow and display the results.
- Select an opportunity to view its fact sheet.
- View only recent opportunities.
- Create a new opportunity.

Create an Opportunity

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

When creating an opportunity:

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

See also

- *Data Status Indicators* on page 14

Inspect Opportunity Details

View the opportunity fact sheet, which displays opportunity details.

From the opportunity fact sheet, you can:

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

Edit Opportunity Details

Edit the details for an opportunity.

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

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

From the Edit Opportunity screen, you can:

- Add or update the basic opportunity details, such as description, sales stage, volume, status, and more.
- Add, update, or delete contact and account relationship and partner information.
- Add or update the notes for this opportunity.

CHAPTER 13 **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.

CHAPTER 14 **Analytics**

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

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

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

Report Display Formats

You can toggle between a graph view or a 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 with a new name, it appears in My Reports.

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

Delete Saved Reports

You can delete any report from 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 real-time snapshot of expected or weighted revenue and revenue targets in your sales pipeline.

Select **Analytics** from the home screen, then select **Pipeline Analysis** to display this report with the default settings. 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 with a user-defined name in My Reports.

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

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

Table 5. 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.
Position	Select your position. If you are a manager and have appropriate permissions, specify Sales Manager for the next two fields to appear.
Sales Team	(Optional) If you have selected sales manager for Position , you can indicate the sales team.
Sales Team Member	(Optional) If you have selected sales manager for Position , you can indicate the sales team members.

Top Opportunities Report

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

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

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

The Top Opportunities report is a column chart that, by default, shows top sales prospects and their expected revenues by closing date.

Options appear in alphabetical order.

Table 6. 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 the number of opportunities to include.
Period	Select the period: Previous , Current , Next , or None . Select None if specifying a closing date.
Sales Rep	If you are a manager and have the appropriate permissions, you can indicate a sales representative or all representatives.
Sort By	Select Closing Date or 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 real-time risk opportunity report.

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

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

The Top Risk Opportunities report is a column chart that, by default, shows the sales prospects at risk by expected revenue.

Options appear in alphabetical order.

Table 7. 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 and have the appropriate permissions, you can indicate a sales representative or all representatives.
Sales Stage	Select the sales stage.
Sort Order	Select Closing Date , Revenue , or Sales Stage .
Time Frame	Select the time frame: Last 7 Days , Last 30 Days , or Last 90 Days .

Top Sales Order Report

Generates a real-time report of your top sales orders.

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

Table 8. 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 .
time frame	Select the time frame: Monthly , Quarterly , or None .

Option	Description
Posting Date	Select a date on the calendar, or None .
Sales Rep	If you are a manager and have the appropriate permissions, you can indicate a sales representative or all representatives.
Number of Sales Orders	Select the number of sales orders to include.
Sort By	Select Net Value or Default .
Sort Order	Select Ascending or Descending .

CHAPTER 15 **Device Data Integration With Mobile Sales**

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

You can:

- Save a CRM contact as a personal contact.
- Save a personal contact as a CRM contact.
- Log a calendar entry as a Mobile Sales activity.
- Log an e-mail message as a Mobile Sales activity.
- Save a CRM activity to your personal calendar.

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 the 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 the CRM activities or native calendar entries to synchronize.• If none, you cannot synchronize calendar entries and Mobile Sales activities.

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

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

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

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 manually synchronize these items.

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**.

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**.

Adding a Calendar Entry as a Mobile Sales Activity

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

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

The Mobile Sales application opens the **Edit Activity** screen, and indicates the calendar subject as the CRM activity description, which you can change.

3. Add the relationship information.
4. Add or edit any other applicable activity details.
5. Select **Save**.

Adding an E-mail Message as a Mobile Sales Activity

Manually log an e-mail message as a Mobile Sales activity, if the Mobile Sales application is configured to manually synchronize these items.

1. Select an e-mail message to open it.
2. Select **Menu > Log as CRM Activity**.

The Mobile Sales application opens the **Edit Activity** screen, and indicates the e-mail message subject as the CRM activity description, which you can change. The body of the e-mail message appears in the Notes.

3. Add the relationship information.
4. Add or edit any other applicable activity details.
5. Select **Save**.

Saving a CRM Activity to Your Personal Calendar

Save a CRM appointment or meeting activity to your personal calendar.

1. From the Mobile Sales home screen, select **Activities**.
2. Select an appointment or meeting activity.
3. Select **Menu > Save to Calendar**.

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.

Prerequisites

Disable Sybase Messaging.

1. Start Sybase Settings.
2. Select **Advanced**.
3. Unselect **Sybase Messaging Enabled**.
4. Select **Done**.

Task

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

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

If you need to uninstall both Sybase Messaging and Mobile Sales, uninstall the programs in the specified order. In some cases, you might need to only uninstall Sybase Mobile Sales. Verify with your system administrator if you are unsure whether to uninstall both programs or only Mobile Sales.

- a) Remove Sybase Mobile Sales.
- b) Remove Sybase Messaging.

Restart the device as required. Once your device restarts, you may need to navigate back to Remove Programs.

4. Select **Done**.
5. 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.

If you cannot delete the Mobile Sales folder, reset your device by turning it off and then on.

See also

- *Unsubscribing from Mobile Sales* on page 16

CHAPTER 17 **Troubleshooting**

Determine the cause of problems and apply the recommended solution.

Messages or Field Names Appear in Different Language

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

Workaround: None.

Online Lookup Returns No Data

Issue: 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 see an error message.

Solution: See *Changing Your Password* in this user guide.

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 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."

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.

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