Device User Guide

Sybase Mobile Sales for SAP® CRM 1.1

iPhone

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CHAPTER 1 Sybase Mobile Sales for SAP CRM

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

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.
- Access real-time reports – review charts and key reports to prioritize actions to achieve sales objectives in the most efficient manner.

Device Requirements

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

Supported Devices

- Apple iPhone 3GS, iOS 4.x
- Apple iPhone 3G, iOS 4.x
- Apple iPod touch 3G, iOS 4.x

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

Device Storage Requirements

Make sure you have the minimum free storage space before installing the Mobile Sales application on the device: 5MB. 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 iPhone Device* on page 3

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, you can select the Mobile Sales display language during 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.

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.

- Delete 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.

See also

- *Installing Mobile Sales on Your iPhone Device* on page 3
- *Device Requirements* on page 1

Installing Mobile Sales on Your iPhone Device

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

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

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

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

See also

- *Connection Settings* on page 5
- *Installation Prerequisites* on page 2
- *Device Requirements* on page 1
- *Upgrading* on page 4

Installing Mobile Sales from App Store

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

Prerequisites

Review the installation prerequisites.

Task

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

Next

- If running Mobile Sales in Live mode, specify the connection settings in **Settings > Sybase** 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.

Installing Mobile Sales Using iTunes

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

Prerequisites

Review the installation prerequisites.

Task

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

Next

- If running Mobile Sales in Live mode, specify the connection settings in **Settings > Sybase** 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.

Upgrading

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

1. Delete Mobile Sales. See *Uninstalling the Mobile Sales Application*.
2. Once you delete the existing version of Mobile Sales, see *Installing Mobile Sales on Your iPhone Device*.

See also

- *Installing Mobile Sales on Your iPhone Device* on page 3
- *Chapter 11, Uninstalling Mobile Sales* on page 45

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 iPhone home page, tap **Settings** > **Sybase**.

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.
URL Prefix	(Optional) If your company is using a Relay Server with a custom configuration, enter the Relay-Server-specific URL.

Table 2. Sybase features

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

Table 3. General

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

Verify Connection to SAP System

Start Mobile Sales, then tap **Settings** > **General** > **Connection Information**.

See also

- *Installing Mobile Sales on Your iPhone Device* on page 3

CHAPTER 2 Starting Sybase Mobile Sales

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.

Task

1. Scroll to the page that contains the **Sybase** icon, then tap to launch.
   - Tap **Setup Connection** to enter the Unwired Server connection information. Tap **OK** to acknowledge the pop-up message indicating that you enter the connection information from the Sybase page in the iPhone Settings application. From the iPhone home screen, select **Settings > Sybase**. Enter the connection information, then restart the application.
   - If you want to enable the Sybase Mobile Workflow for SAP® Business Suite application within Mobile Sales, select **Settings > Sybase**, then tap **On** for **Mobile Workflow**. Tap **Workflow** in the Tab bar to view the workflows. See *Sybase Mobile Workflow for SAP Business Suite Device User Guide for iPhone*.
2. Enter your Mobile Sales personal identification number (PIN).

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

   If you forget your PIN and fail to enter the correct PIN after nine attempts, the Mobile Sales data is deleted from your device. To access the Mobile Sales application and your SAP CRM data, start the Mobile Sales application again, then create a new PIN. Proceed to the next step to create a new subscription to the SAP system.
3. Enter the SAP account and password.

4. (Optional) If you wish to view Mobile Sales labels and messages in a supported language other than the one set for the device, select **Language**.
5. Select **Continue** to complete the login process.

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.

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.

1. Scroll to the page that contains the **Sybase** icon, then tap to launch.
2. Tap **Demo Application**.

Switching from Demo Mode to Live Mode

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

1. Exit the Mobile Sales application.
2. Start the Mobile Sales application.
3. Tap **Setup Connection** to enter the Sybase Settings connection information.

Next

Start Sybase Mobile Sales.

See also

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

CHAPTER 3 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.
- Most Recent – lists the most recently viewed fact sheets, with the most recent on top.
- Notifications – displays all new activities, leads, and opportunites that are assigned to the user. Notifications also displays login failure messages during login to the SAP server, as well as messages for any updates, new activity creations, or new queries for reports during synchronization with the SAP server.
- Today's activities – lists all activities for today. Select an activity from this view to view its fact sheet. By default, this feature is turned off. To view today's activities, turn on **Today's Activities** in Home Page Settings.

See also

- *Home Page Settings* on page 13

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 4. 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. To clear the warnings, open the fact sheet and tap **Clear Messages**. If you want to fix the issues that caused the warnings, tap **Fix It**, which opens the object for editing. Make your changes, then tap **Done**. If you fix the issues, the object is pending until synchronized with the SAP server.
	Red error icon. SAP server has rejected the new or updated object. You must fix or undo the changes to clear the error. View error messages in the object's fact sheet. Select the message to view its details. If a record is rejected because of incorrect login information, the application displays a window for you to enter your correct password. After you enter the correct login information, you must manually edit the affected record again and save it.

See also

- *Chapter 12, Troubleshooting* on page 47

Mobile Sales Synchronization

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

If you do not have network connectivity, you can work offline; however, you do not receive new data from the SAP system, and your device cannot save any changes you make back to the SAP server. Once online, when creating new or updating existing information, the information is synchronized with the SAP server. Once connected to the server, data is refreshed automatically.

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

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

General Settings

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

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

Table 5. General settings

Option	Description
Connection Information	Displays connection and subscription status. Tap **Unsubscribe** to disconnect from the SAP server and delete all data stored locally on your device.
Change Password	Enter or change the password to access the SAP server. Check with your system administrator before changing this password.
GeoCorder Key	(Optional) Enter the key for the NAVTEQ maps, so that you can view account and contact addresses on a map from within the Mobile Sales application. Your company must purchase this service directly from NAVTEQ.
GeoCorder Server	(Optional) Enter the NAVTEQ server name.

Option	Description
Log Level Settings	Log Level settings indicate the depth of details to capture in the error log. • Off – displays no information or error messages in the error log. • Fatal – provides information about severe errors that might cause the application to abort. • Error – provides information about internal or unexpected errors that might allow the application to continue running. • Warn – provides information that indicates potentially harmful situations. • Info – provides information messages that indicate the progress of an operation. • Debug – provides details useful to debug the application (for system administrators or developers).
About	Displays version and legal information for the Mobiles Sales application.

Home Page Settings

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

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

Table 6. Home Page settings

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

See also

- *Mobile Sales Home Screen* on page 9

Recent Items Settings

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

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

Accounts Settings

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

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

Table 7. Accounts settings

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

Contacts Settings

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

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

Table 8. Contacts List settings

Option	Description
Account Name	Indicates whether to display the account name for the contact in the contacts list.

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

Table 9. Contact Details settings

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

Activities Settings

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

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

Table 10. Activities settings

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

Leads Settings

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

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

Table 11. Leads settings

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

Opportunities Settings

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

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

Table 12. Opportunities settings

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

Analytics Settings

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

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

Table 13. Analytics settings

Option	Description
Analytics	**ON** by default. If you select **OFF**, the Analytics facet no longer appears on the home screen.
Dashboard	**ON** by default. The report dashboard displays report data in three formats depending on the report type. If the dashboard is **OFF**, report data displays in one format only depending on the report type: bar chart or column chart.

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. You can also reset your password from the notification that indicates a login failure. Notifications display in descending date order, with the most recent on top.

Viewing Notifications

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

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

See also

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

Deleting and Clearing Notifications

Delete an individual notification, or clear all notifications.

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

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

See also

- *Viewing Notifications* on page 17
- *Resetting Your Password in Notifications* on page 18

Resetting Your Password in Notifications

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

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

See also

- *Viewing Notifications* on page 17
- *Deleting and Clearing Notifications* on page 18

CHAPTER 4 Maps

Mobile Sales supports different map options for your smartphone.

For iPhone, the default map provider is Google Maps mapping service, where you can view an account or a contact address on a map, obtain driving directions to an account or a contact, and use all the features that Google Maps provides.

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

Viewing an Address on a Map

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

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

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

See also

- *Displaying Driving Directions to Account or Contact* on page 19
- *Finding Accounts or Contacts Near Current Location* on page 20

Displaying Driving Directions to Account or Contact

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

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

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

4. If viewing the map within Mobile Sales, tap **Google Map** to launch Google Maps in a browser so you can get driving directions to the account.

See also

- *Viewing an Address on a Map* on page 19
- *Finding Accounts or Contacts Near Current Location* on page 20

Finding Accounts or Contacts Near Current Location

View on map all accounts near your current location.

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

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

   The map displays the accounts or contacts near your current location.

See also

- *Viewing an Address on a Map* on page 19
- *Displaying Driving Directions to Account or Contact* on page 19

CHAPTER 5 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.
- 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 6, Contacts Management* on page 27
- *Chapter 7, Activity Management* on page 33
- *Chapter 8, Lead Management* on page 37
- *Chapter 9, Opportunity Management* on page 39

Searching Accounts

Narrow the results to find a specific account.

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

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

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

Viewing Accounts

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

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

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) Tap **Recent** or **Today** to narrow the list.
5. Select an activity to view its fact sheet, or to add or edit the notes for the activity.

Viewing Leads for an Account

View leads for an account.

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

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

Viewing Opportunities for an Account

View opportunities for an account.

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

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

Viewing Account Interaction History

View the interaction history for the account.

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

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

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.

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

See also

- *Logging a Phone Call as an Activity* on page 35

E-mailing an Account

E-mail an account from the Account details screen.

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

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

See also

- *Logging an E-mail as an Activity* on page 35

Updating Account Details

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

You cannot update accounts with pending changes.

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

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

Creating or Editing a Note for an Account

Create or edit a note for an account.

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

3. Near the bottom of the screen, select **Notes**.
4. Tap the text input box, add or edit text for this note, then tap **Done**.

CHAPTER 6 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.
- Quicky 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 5, Account Management* on page 21
- *Chapter 7, Activity Management* on page 33
- *Chapter 8, Lead Management* on page 37
- *Chapter 9, Opportunity Management* on page 39

Searching Contacts

Search to find a contact.

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

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

Viewing Contacts

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

To	Do this
View contact details	Select the contact.
Find a contact that starts with a specific letter	On the right side of the screen, tap the appropriate letter.

To	Do this
View recently viewed contacts	Tap **Recent**. The Recent Contacts screen lists the contact fact sheets you recently viewed, with the most recent on top.

Viewing and Editing Alternate Contact Information

View alternative (personal) contact information.

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

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

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. (Optional) Click **Recent** or **Today** to narrow the list.
5. Select an activity to view its fact sheet, or to add or edit the notes for the activity.

Viewing Leads for a Contact

View leads for a contact.

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

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

Viewing Opportunities for a Contact

View opportunities for a contact.

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

Viewing Contact Interaction History

View the interaction history for the contact.

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

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

Calling a Contact

Call a contact from within the Mobile Sales application.

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

See also

- *Logging a Phone Call as an Activity* on page 35

E-mailing a Contact

E-mail a contact from the Contact details screen.

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

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

See also

- *Logging an E-mail as an Activity* on page 35

Updating Contact Details

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

You cannot update contacts with pending changes.

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

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

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

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. Tap **Convert to Personal Contact**, then tap **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. Tap the text input box, add or edit text for this note, then tap **Done**.

CHAPTER 7 Activity Management

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 creating activities for ingoing and outgoing e-mails and phone calls.
- Search, view, and create activities, as well as accounts and contacts associated with an activity.
- Log phone calls by creating CRM activities.
- Log e-mail messages by creating CRM activities.

See also

- *Chapter 5, Account Management* on page 21
- *Chapter 6, Contacts Management* on page 27
- *Chapter 8, Lead Management* on page 37
- *Chapter 9, Opportunity Management* on page 39

Searching and Viewing Activities

Search to find an activity.

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

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

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

3. Select the activity to view its fact sheet.

Adding a New Activity for Account or Contact

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

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

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

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

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

8. Tap **Done**.

Next

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

Adding an Existing Activity to Account or Contact

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

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

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

Logging a Phone Call as an Activity

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

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

Next

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

See also

- *Calling the Account Phone Number* on page 23
- *Calling a Contact* on page 29

Logging an E-mail as an Activity

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

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

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

By default, the activity status is Complete.

Next

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

See also

- *E-mailing an Account* on page 24
- *E-mailing a Contact* on page 30

Updating an Activity

Edit the details for an activity.

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

CHAPTER 8 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 and add or edit notes for the lead.

See also

- *Chapter 5, Account Management* on page 21
- *Chapter 6, Contacts Management* on page 27
- *Chapter 7, Activity Management* on page 33
- *Chapter 9, Opportunity Management* on page 39

Searching and Viewing Leads

Search to find a lead.

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

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

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

3. Select the lead to view.

See also

- *Updating Lead Details* on page 38

Updating Lead Details

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

You cannot update leads with pending changes.

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

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

See also

- *Searching and Viewing Leads* on page 37

Creating or Editing a Note for a Lead

Create or edit a note for a lead.

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

CHAPTER 9 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 5, Account Management* on page 21
- *Chapter 6, Contacts Management* on page 27
- *Chapter 7, Activity Management* on page 33
- *Chapter 8, Lead Management* on page 37

Searching and Viewing Opportunities

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

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

See also

- *Updating Opportunity Details* on page 40

Updating Opportunity Details

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

You cannot update opportunities with pending changes.

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

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

See also

- *Searching and Viewing Opportunities* on page 39

CHAPTER 10 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.

Report Display Formats

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

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

You can select the Refresh button to get the lastest report data. You can toggle between the  graph view or  table (text) view by selecting the appropriate icon at the top of the report. In text view, you can scroll to the bottom to view the report criteria.

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.

Tap the report, tap **Edit**, change the desired report options, select **Save As**, then enter a report name.

Delete Saved Reports

You can delete any report saved in My Reports.

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

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

Table 14. Pipeline report details

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

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 report dashboard displays a column chart (default), line chart, pie chart, or text view of the top opportunities data. Tap the thumbnail to display a different chart type as the main chart, or zoom to view graph data.

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

Options appear in alphabetical order.

Table 15. Top Opportunity report details

Option	Description
Number Of Opportunities	Select number of opportunities to display.
Period	Select the period: **Previous**, **Current**, **Next**, or **None**.
Sales Representative	If you are a manager, you can indicate a sales representative or all representatives.
Sort By	Select **Closing Date** or **Expect Sales Volume**.
Sort Order	Select **Ascending** or **Descending**.
Status	Select the sales order status.
Time Frame	Select the time frame: **Monthly**, **Quarterly**, or **None**.

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 report dashboard displays a column chart (default), line chart, pie chart, or text view of the top opportunities data. Tap the thumbnail to display a different chart type as the main chart, or zoom to view graph data.

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

Options appear in alphabetical order.

Table 16. Top Risk Opportunity report details

Option	Description
Number Of Opportunities	Select number of opportunities to display.
Sales Representative	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**.

CHAPTER 11 Uninstalling Mobile Sales

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

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

1. Unsubscribe from the SAP system.
2. On the iPhone home screen, hold your finger on the Sybase application icon until it begins to shake or wiggle.
3. Tap the **X** in the upper left-hand corner of the application icon.

See also

- *Upgrading* on page 4

CHAPTER 12 Troubleshooting

Determine the cause of problems and apply the recommended solution.

Messages or Field Names Appear in Different Language

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

Workaround: None.

Maximum Field Size for Account Values Not Enforced

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

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

Subscription Not Found

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

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

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

Phone Number Extensions Not Synchronized With Personal Contacts

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

Workaround: None.

Reports Do Not Show Edit Button in Landscape Mode

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

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

Activities From SAP System Show Empty Dates

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

Workaround: None.

Country Code For Phone Number Does Not Flow to Device

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

Workaround: None.

Mobile Sales Objects Reflect SAP Server Time Zone

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

Workaround: None.

No Report Data Appears (Analytics)

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

Workaround:

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

Device Data and SAP System Data Do Not Always Match

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

Workaround: None.

See also

- *Data Status Indicators* on page 9

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