



# **SAP Business One Sales**

## **Mobile app for iOS and Android**

August 2021

PUBLIC

# SAP Business One Sales - Introduction

SAP Business One Sales lets you handle your sales activities anywhere, anytime and via any mobile device.

Sales employees can access to the most relevant business information and processes to help them manage customers and sales opportunities, fast and effectively.

## Dedicated

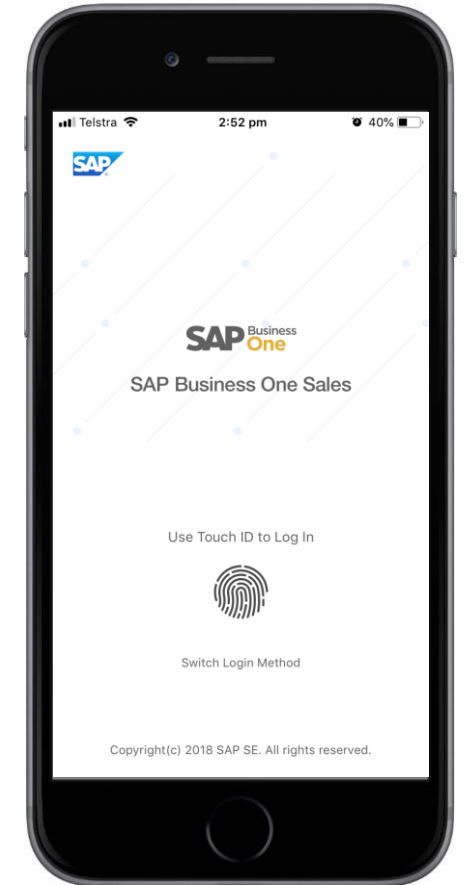
- Tailored for sales roles, holistic CRM management drives sales productivity
- Insight to customers, deals, predictability in sales operations

## Intuitive

- User-friendly and simple to use

## Interactive

- Access data in real time
- Respond directly and trigger processes
- All changes automatically update the SAP Business One backend



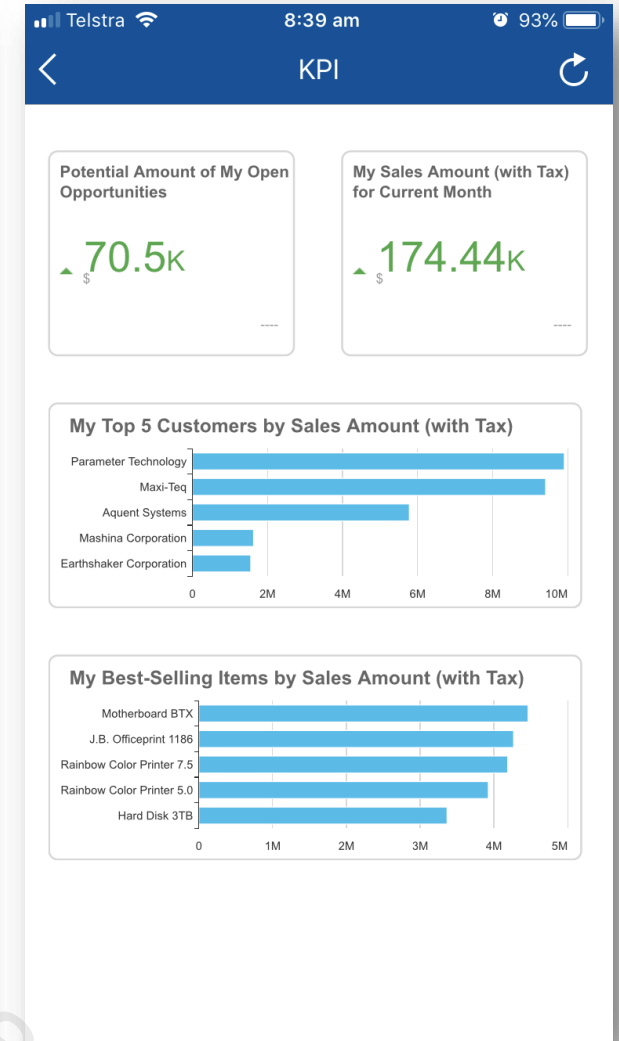
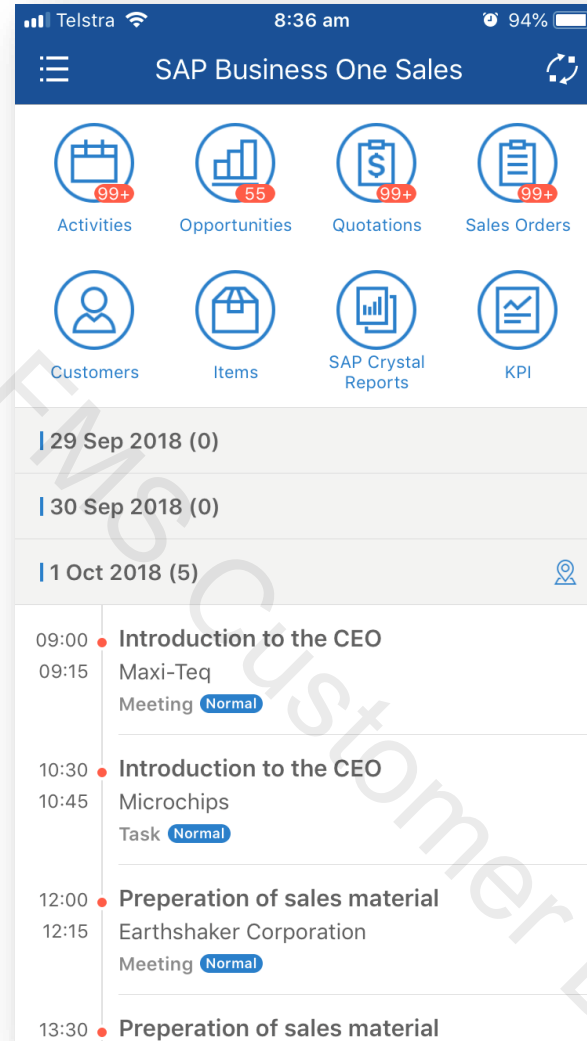
# SAP Business One Sales - Getting Started

## Home Page:

- Central access to all sales-relevant modules
- Shows number of open items
- Access to SAP Business One calendar and activities

## Key Performance Indicator (KPI) Screen shows user-specific dashboards:

- Potential amounts of open opportunities
- Sales Order amount of the current month
- Top 5 customers
- Top 5 best-selling items



# SAP Business One Sales - Technical Information

## Requirements for iOS

- SAP Business One 9.2 PL10, version for SAP HANA, or higher  
SAP Business One 10.0 FP2105 (Microsoft SQL)
- Apple iPhone 5 or newer, iOS 8.0 or higher
- Download from Apple App Store

## Requirements for Android

- SAP Business One 9.2 PL10, version for SAP HANA, or higher  
SAP Business One 10.0 FP2105 (Microsoft SQL)
- Android 7.0
- Download from Google Play Store

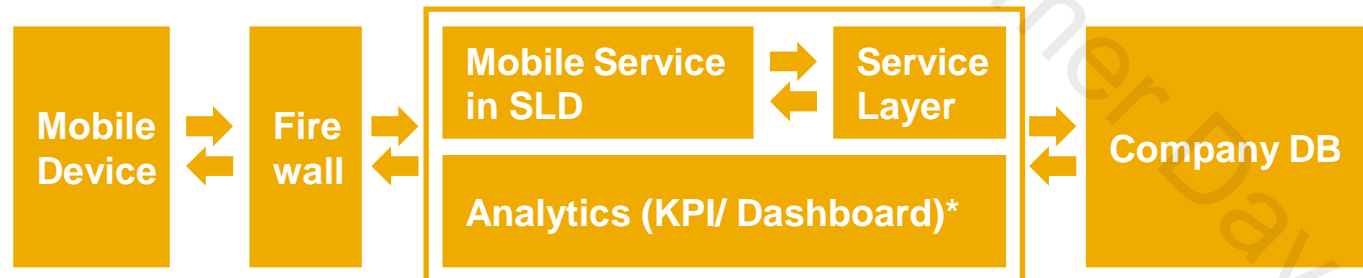
**Supports:** Service Layer, SAP Business One Analytics\*, and App Framework\*

**License:** Professional, Limited CRM, Starter Package, and Mobile Sales users (new)

**Security:** Basic access authentication at logon, license-based function-level and user-based data-level authorization (data ownership), valid SSL certificates enforced, Apple TouchID

**Languages:** All 28 languages of SAP Business One

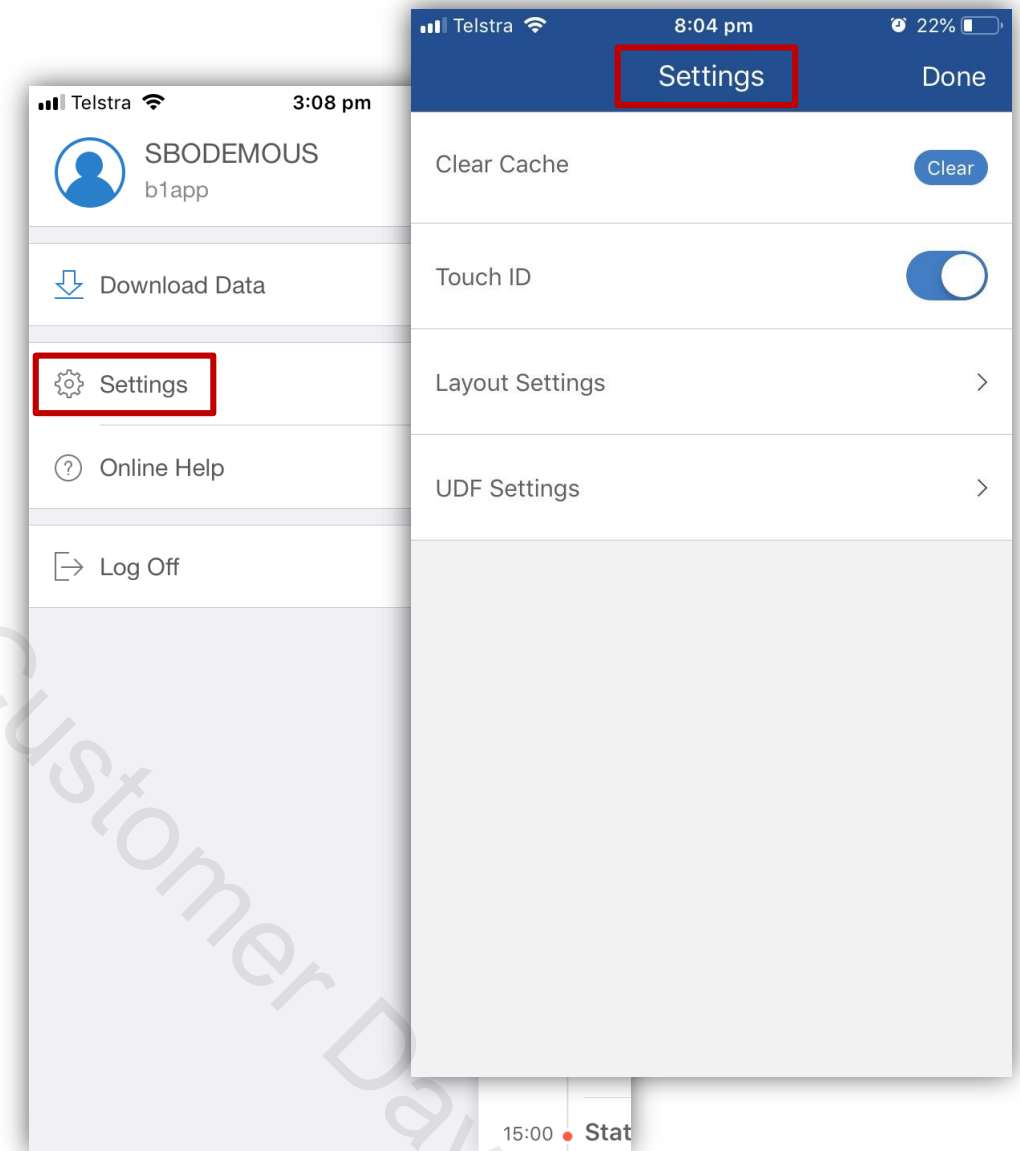
## Connection flow:



# SAP Business One Sales - Configuring Settings

## Features:

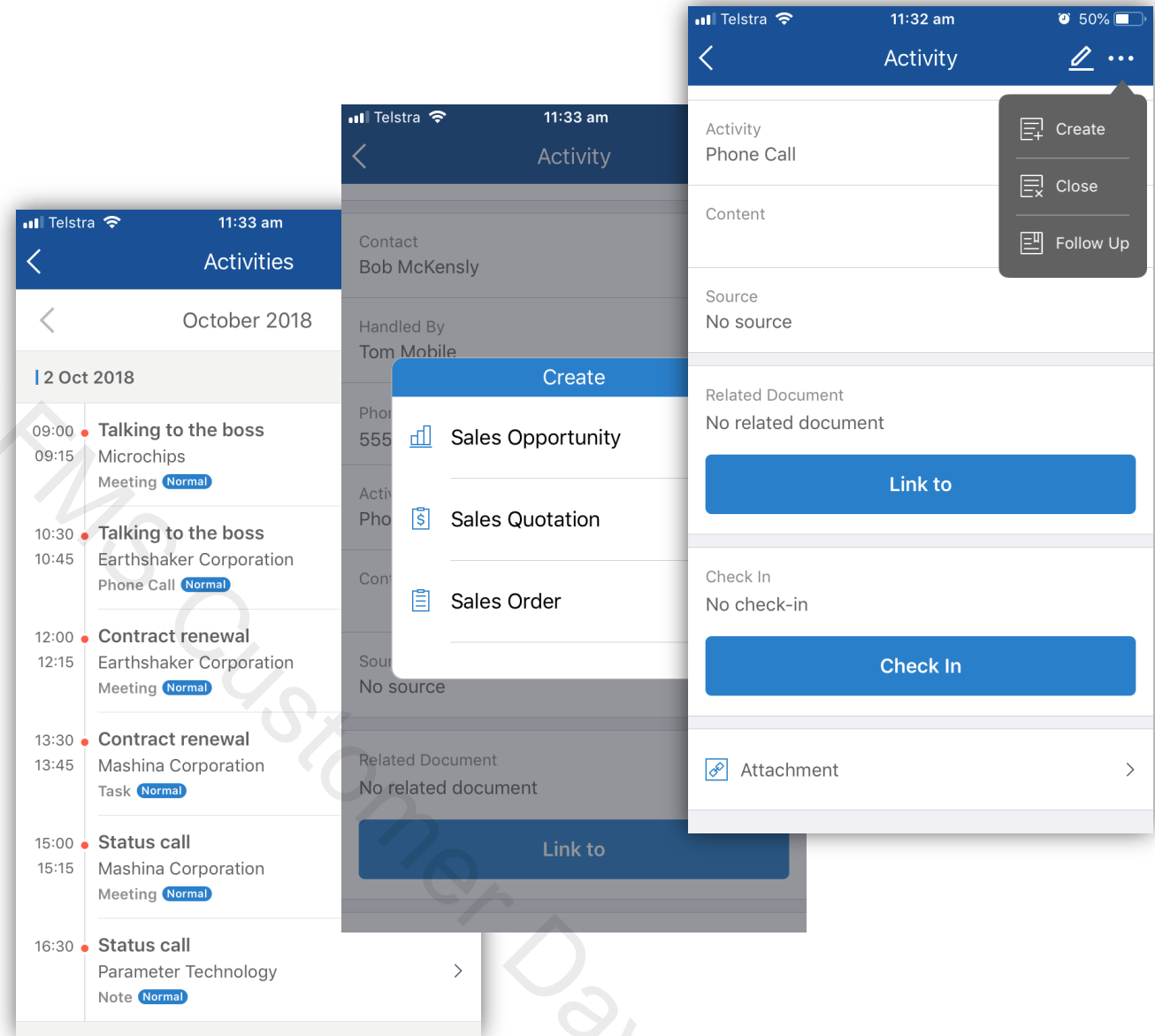
- Display your company name and user code.
- Download and synchronize customer and item data for offline mode
- Clear Cache allows you to clear your current users data
- Define your document layout settings
- Display or hide user-defined fields (UDFs).
- Touch ID/Face ID configuration available depending on your mobile device.
- Speech2Text capabilities.
- Access online help.
- Log out activities.



# SAP Business One Sales - Managing Activities

## Features:

- View activities assigned to you in a calendar format
- Edit and close existing activities or create new activities
- Create follow-up activities
- Create sales opportunities, quotations, or orders based on activities
- Assign activities to a group recipient list
- Link related documents such as sales quotations or orders
- Upload attachments to activities

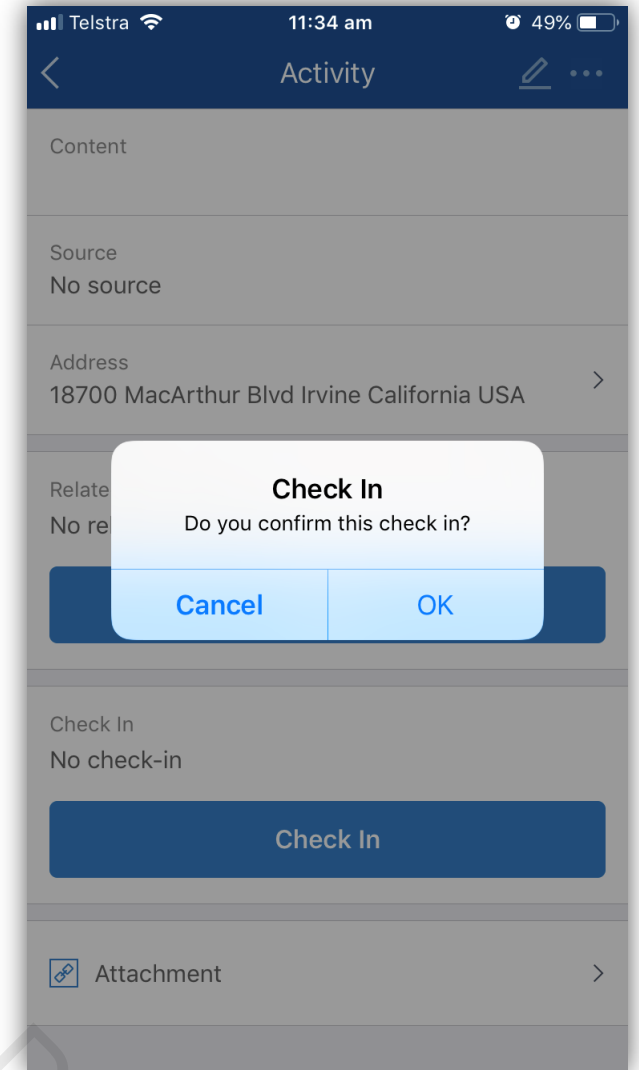
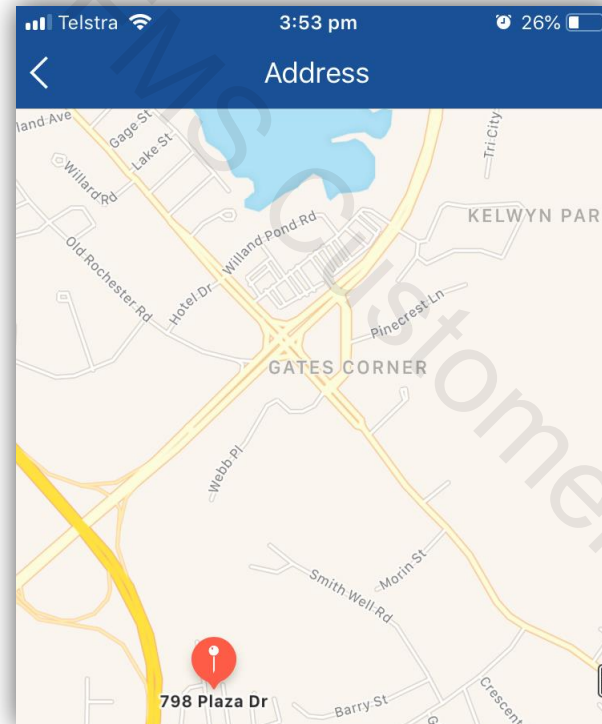




# SAP Business One Sales - Location based check-in

## Powerful and convenient scenario to check-in location of sales activities

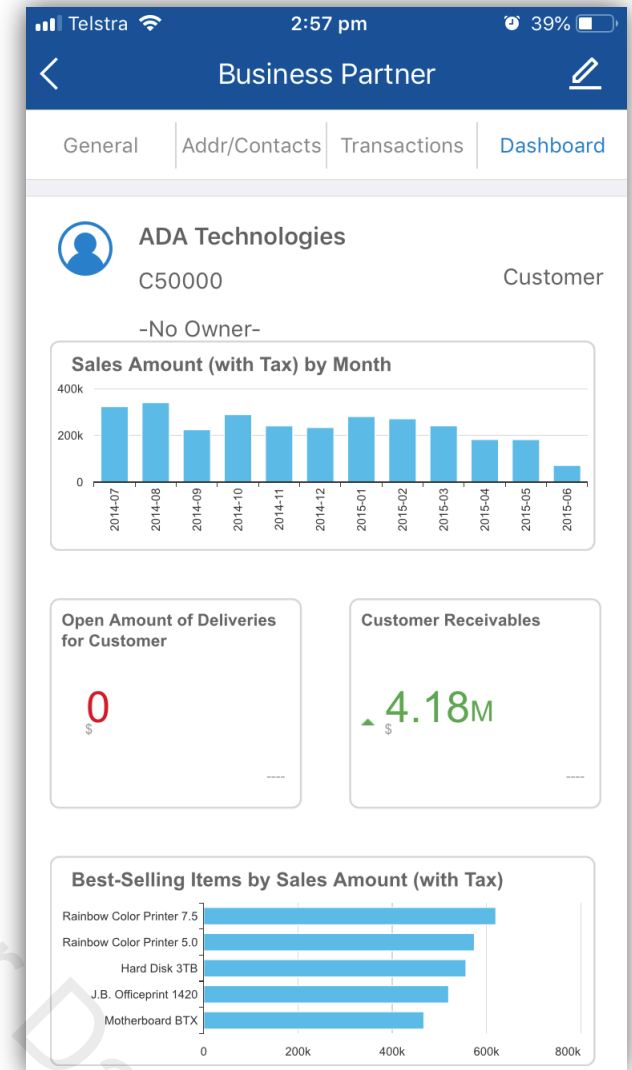
- Reports the location of an activity for every stage of the sales process
- Check-in data can be used for effective monitoring of activities by sales managers using a dedicated activity report within the SAP Business One client
- Multiple users assigned to the same activity can check in.
- Embedded in iOS/Google geographic services



# SAP Business One Sales - Managing Customer Data

## Features:

- Create new customers or leads, view Business Partner details, including related activities, sales documents (sales quotations, sales orders, sales opportunities), special prices and account information
- Modify contact details, log new activities, initiate a phone call, email, or text messages directly
- Define a net, gross or mix price mode when adding, editing or viewing a business partner.
- Locate your contact on a map and plan a route
- Download/upload attachments to business partners
- Support of Business Partner data ownership function





# SAP Business One Sales - Managing Customer Data (continued)

## Features:

- Filter by business partner type - Customer or Lead
- Sort by name, code, recency, frequency, monetary value, account balance, churn probability and more.
- Customer is rated with 1-5 stars, based on frequency of orders and monetary values
- The churn field displays the customer attrition risk as well as the churn probability
- Average amount per sales order displayed next to the proposed re-order date
- Leads get displayed by industry, activity days

**Maxi-Teq** ★★★★★  
C20000

R: 1 days ago	F: 42.1 SOs/Yr	M: 31.6 M
Account Balance: 7.2 M	Credit Limit Used: N/A	Churn: L (0%)
Proposed Reorder Date: 2018-10-10		59.0 K / SO

**Customers**

- Name
- Code
- Recency
- Frequency
- Monetary
- Account Balance
- R.F.M.

**Customers**

Customer | Lead

**Mashina Corporation** ★★★★★  
C42000

R: 1 days ago	F: 42.3 SOs/Yr	M: 31.4 M
Account Balance: 6.6 M	Credit Limit Used: N/A	Churn: L (0%)
Proposed Reorder Date: 2018-10-10		58.6 K / SO

**Maxi-Teq** ★★★★★  
C20000

R: 1 days ago	F: 42.1 SOs/Yr	M: 31.6 M
Account Balance: 7.2 M	Credit Limit Used: N/A	Churn: L (0%)
Proposed Reorder Date: 2018-10-10		59.0 K / SO

**Earthshaker Corporation** ★★★★★  
C40000

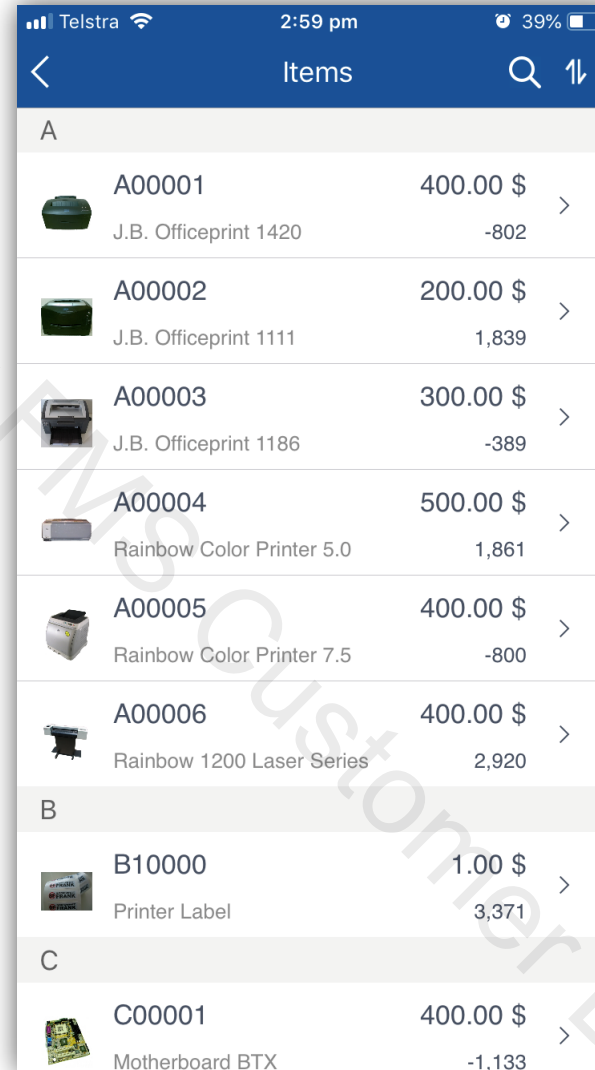
R: 1 days ago	F: 41.0 SOs/Yr	M: 31.2 M
Account Balance: 6.9 M	Credit Limit Used: N/A	Churn: L (0%)
Proposed Reorder Date: 2018-10-10		59.9 K / SO

**Microchips** ★★★★★  
C30000









# SAP Business One Sales – Viewing Items in Stock

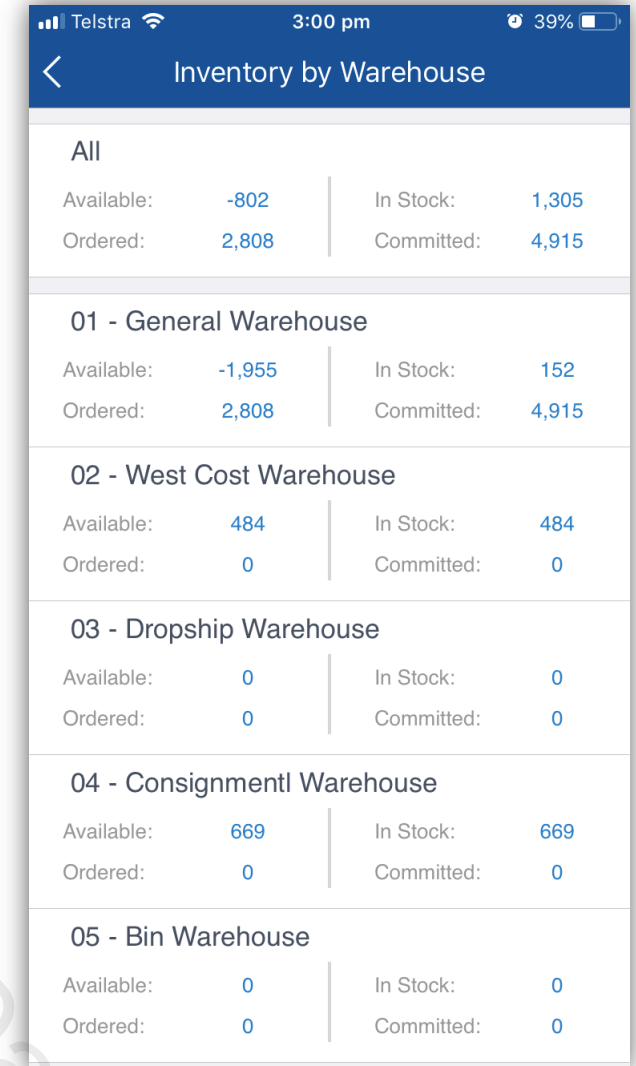
## Features:

- View information about items in inventory, including unit price or in-stock quantity
- View the quantity of an item by warehouse location
- Select a net or gross price list for each item
- Search for items in inventory
- Check item in assigned price lists



The screenshot shows the 'Items' screen in the SAP Business One mobile app. The status bar at the top indicates 'Telstra' network, signal strength, 2:59 pm, and 39% battery. The app header has a back arrow, the title 'Items', a search icon, and a list icon. The items are grouped by category: A, B, and C. Each item entry includes a small icon, an item code, a description, a unit price, and an in-stock quantity. A right arrow is present for each item.

A			
	A00001	400.00 \$	>
	J.B. Officeprint 1420	-802	
	A00002	200.00 \$	>
	J.B. Officeprint 1111	1,839	
	A00003	300.00 \$	>
	J.B. Officeprint 1186	-389	
	A00004	500.00 \$	>
	Rainbow Color Printer 5.0	1,861	
	A00005	400.00 \$	>
	Rainbow Color Printer 7.5	-800	
	A00006	400.00 \$	>
	Rainbow 1200 Laser Series	2,920	
B			
	B10000	1.00 \$	>
	Printer Label	3,371	
C			
	C00001	400.00 \$	>
	Motherboard BTX	-1,133	



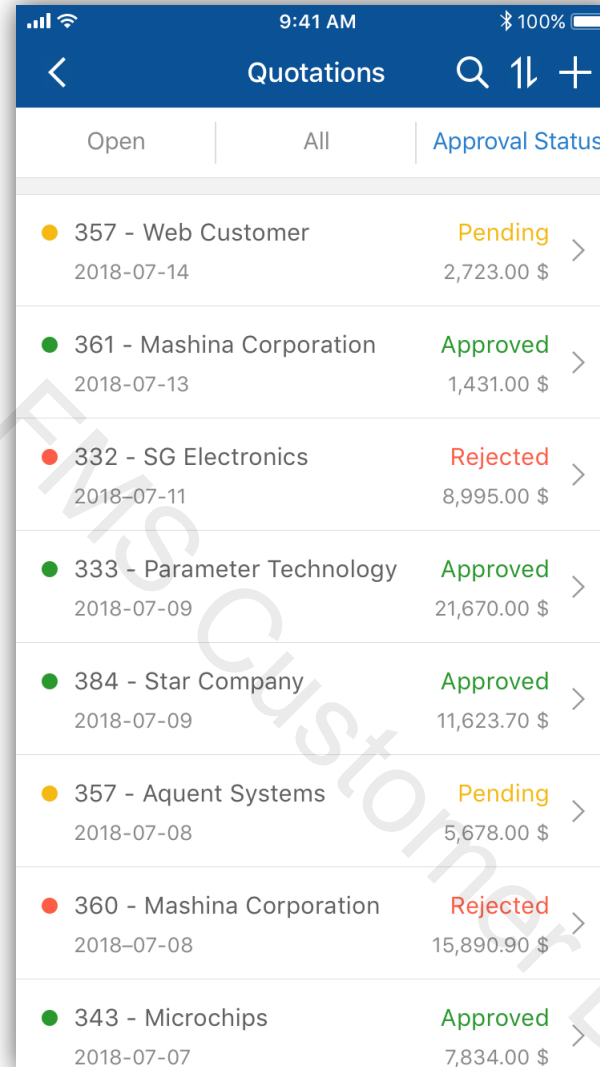
The screenshot shows the 'Inventory by Warehouse' screen in the SAP Business One mobile app. The status bar at the top indicates 'Telstra' network, signal strength, 3:00 pm, and 39% battery. The app header has a back arrow and the title 'Inventory by Warehouse'. The screen displays inventory data for five warehouses: All, 01 - General Warehouse, 02 - West Cost Warehouse, 03 - Dropship Warehouse, 04 - Consignment Warehouse, and 05 - Bin Warehouse. Each warehouse entry shows 'Available', 'Ordered', 'In Stock', and 'Committed' quantities.

All			
Available:	-802	In Stock:	1,305
Ordered:	2,808	Committed:	4,915
01 - General Warehouse			
Available:	-1,955	In Stock:	152
Ordered:	2,808	Committed:	4,915
02 - West Cost Warehouse			
Available:	484	In Stock:	484
Ordered:	0	Committed:	0
03 - Dropship Warehouse			
Available:	0	In Stock:	0
Ordered:	0	Committed:	0
04 - Consignment Warehouse			
Available:	669	In Stock:	669
Ordered:	0	Committed:	0
05 - Bin Warehouse			
Available:	0	In Stock:	0
Ordered:	0	Committed:	0

# SAP Business One Sales – Managing Sales Documents

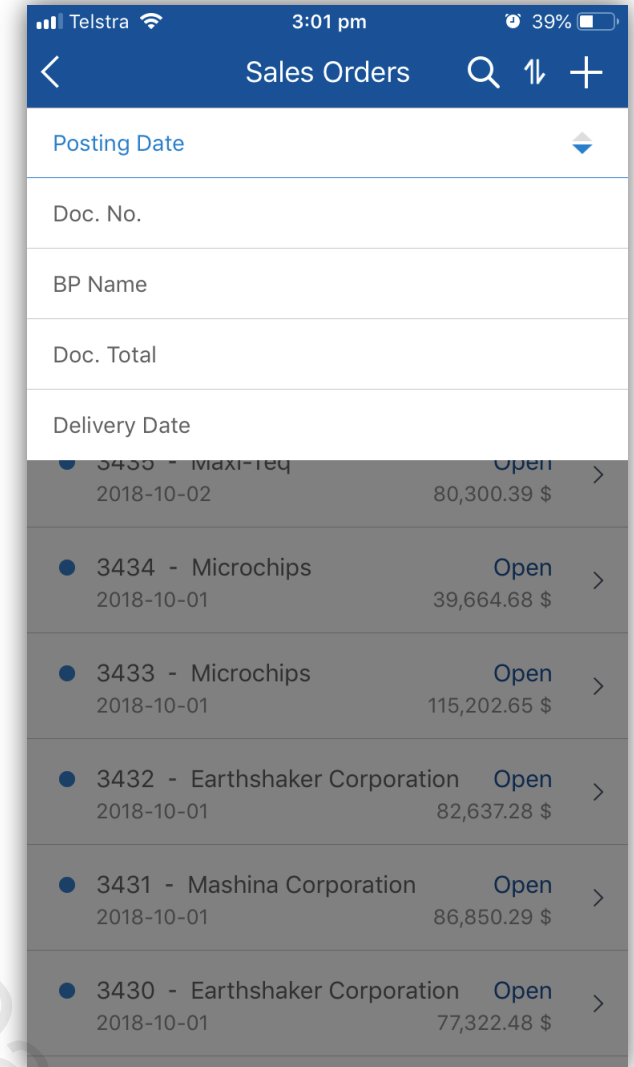
## Features – orders and quotations

- Search, create and cancel sales quotations, and sales orders
- Update existing sales quotations and sales orders and manage activities related to these documents
- Users can update approved documents and draft documents with Pending or Approved status
- Sort documents by document number, BP name, document total or delivery date
- Copy sales quotations to sales orders
- View, add, edit and close activities related to sales quotations and sales orders
- Data ownership for documents



This screenshot shows the 'Quotations' list in SAP Business One. The interface includes a top bar with a back arrow, the title 'Quotations', and search, sort, and add icons. Below the title are tabs for 'Open', 'All', and 'Approval Status'. The main table lists individual quotations with columns for document number, customer name, date, status, and total amount. Each row has a chevron icon for further details.

Open	All	Approval Status
● 357 - Web Customer	2018-07-14	Pending 2,723.00 \$
● 361 - Mashina Corporation	2018-07-13	Approved 1,431.00 \$
● 332 - SG Electronics	2018-07-11	Rejected 8,995.00 \$
● 333 - Parameter Technology	2018-07-09	Approved 21,670.00 \$
● 384 - Star Company	2018-07-09	Approved 11,623.70 \$
● 357 - Aquent Systems	2018-07-08	Pending 5,678.00 \$
● 360 - Mashina Corporation	2018-07-08	Rejected 15,890.90 \$
● 343 - Microchips	2018-07-07	Approved 7,834.00 \$



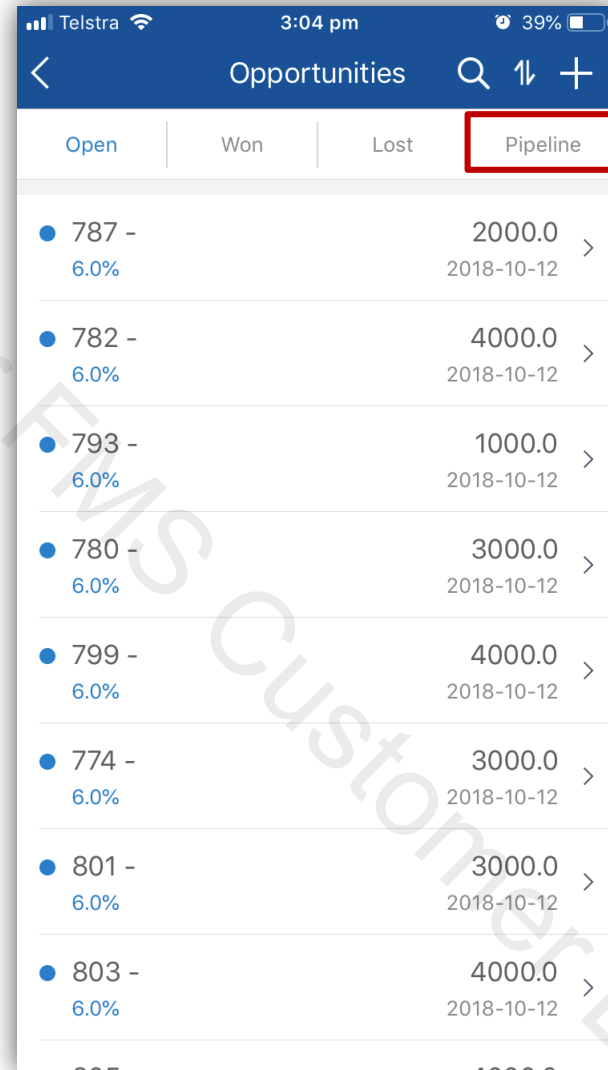
This screenshot shows the 'Sales Orders' list in SAP Business One. The interface includes a top bar with a back arrow, the title 'Sales Orders', and search, sort, and add icons. Below the title are tabs for 'Posting Date', 'Doc. No.', 'BP Name', 'Doc. Total', and 'Delivery Date'. The main table lists individual sales orders with columns for document number, customer name, date, status, and total amount. Each row has a chevron icon for further details.

Posting Date	Doc. No.	BP Name	Doc. Total	Delivery Date
● 3433 - Microchips	2018-10-02	Open	80,300.39 \$	>
● 3434 - Microchips	2018-10-01	Open	39,664.68 \$	>
● 3433 - Microchips	2018-10-01	Open	115,202.65 \$	>
● 3432 - Earthshaker Corporation	2018-10-01	Open	82,637.28 \$	>
● 3431 - Mashina Corporation	2018-10-01	Open	86,850.29 \$	>
● 3430 - Earthshaker Corporation	2018-10-01	Open	77,322.48 \$	>

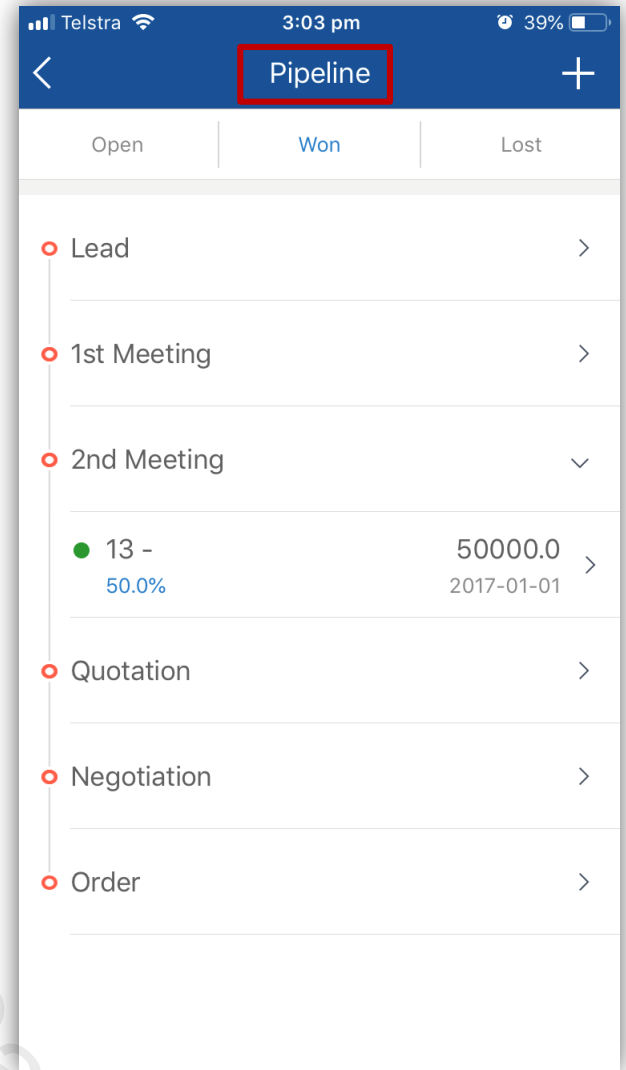
# SAP Business One Sales - Managing Sales Opportunities

## Features:

- Create, view, and search for sales opportunities
- View, edit, and create stages for sales opportunities
- Display all the sales opportunities in pipeline mode



Open	Won	Lost	Pipeline
787 - 6.0%		2000.0 2018-10-12	>
782 - 6.0%		4000.0 2018-10-12	>
793 - 6.0%		1000.0 2018-10-12	>
780 - 6.0%		3000.0 2018-10-12	>
799 - 6.0%		4000.0 2018-10-12	>
774 - 6.0%		3000.0 2018-10-12	>
801 - 6.0%		3000.0 2018-10-12	>
803 - 6.0%		4000.0 2018-10-12	>



Open	Won	Lost
Lead		>
1st Meeting		>
2nd Meeting		>
13 - 50.0%	50000.0 2017-01-01	>
Quotation		>
Negotiation		>
Order		>

# SAP Business One Sales - Managing Attachments

## Features:

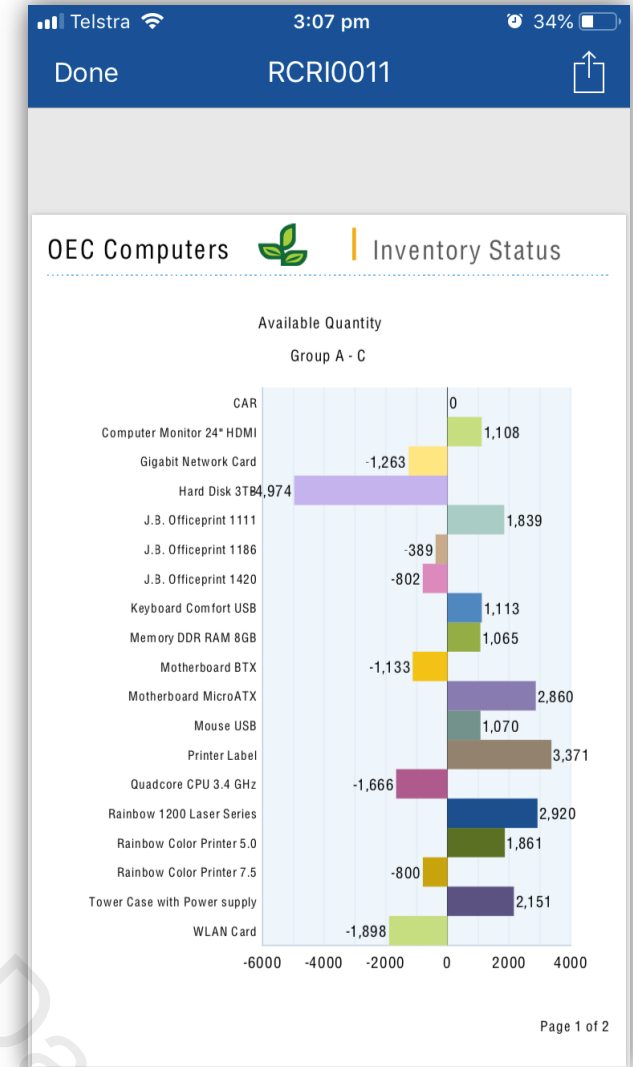
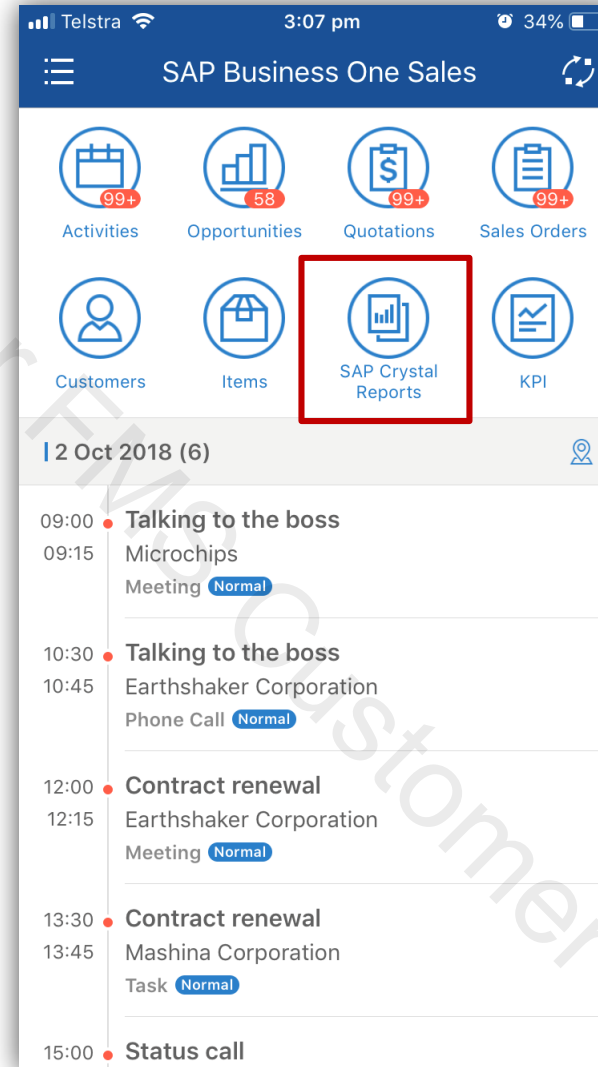
- View, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls
- Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears
- Upload attachments of image file types only, by either browsing to the required image file, or by taking a picture using your mobile device



# SAP Business One Sales - Crystal Reports

## Features:

- New Crystal Report menu option for SAP Business One Sales.
- Easily view your SAP Business One crystal reports to make informed decisions on the run.
- Download and/or share your crystal reports easily with others.

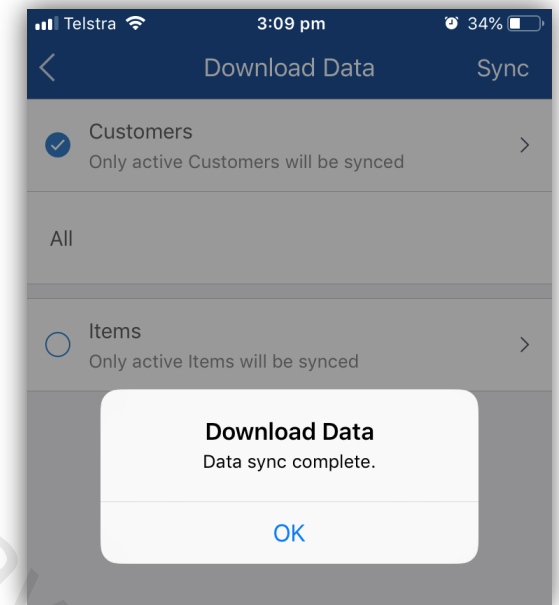
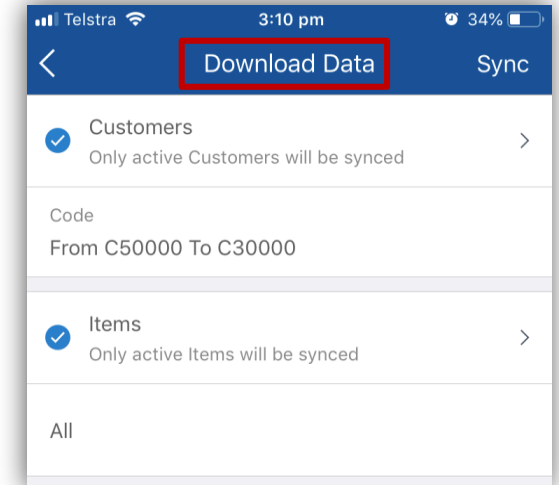
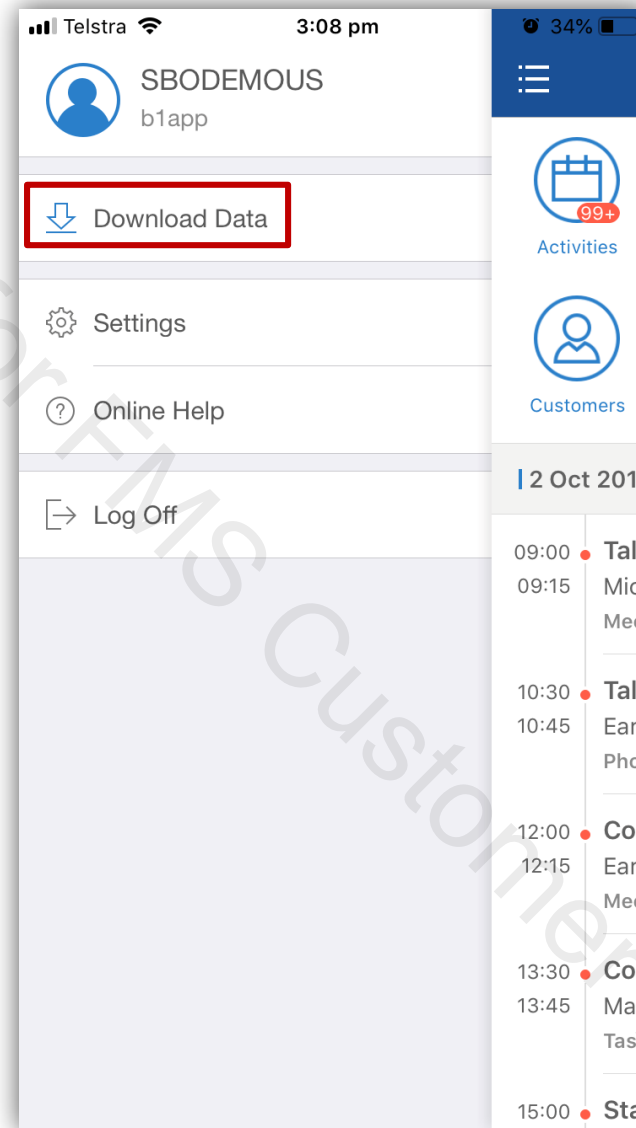




# SAP Business One Sales - Data Synchronization for Offline Mode

## Features:

- Business Partner & Items details can be downloaded in batches and viewed in offline mode.
- Large numbers of business partner data and items are able to be synchronized to your local mobile device easily.



# SAP Business One Sales – Caching for Offline Mode

## Features:

- All Business Partner and Item data is now cached.
- You can set filters to select the data you would like to cache.
- Allows you to view data in offline mode.

3:12 pm 33%			
Items			
A			
A00001	J.B. Officeprint 1420	400.00 \$	>
		-802	
A00002	J.B. Officeprint 1111	200.00 \$	>
		1,839	
A00003	J.B. Officeprint 1186	300.00 \$	>
		-389	
A00004	Rainbow Color Printer 5.0	500.00 \$	>
		1,861	
A00005		400.00 \$	>

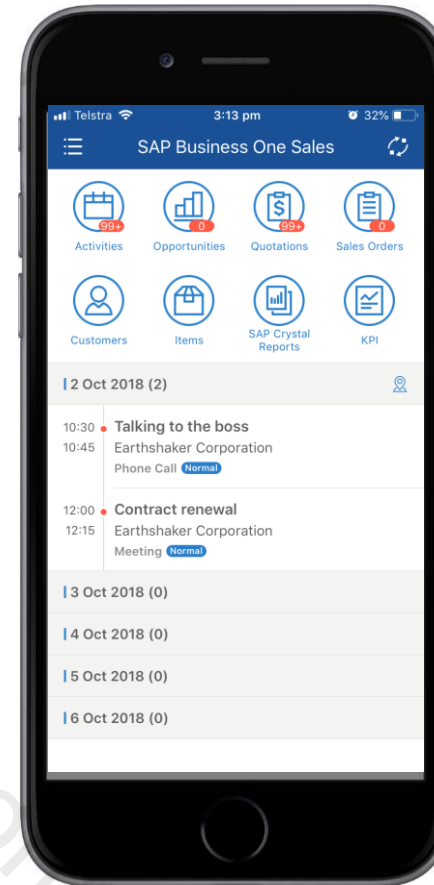
3:12 pm 32%		
Customers		
Customer   Lead		
A		
ADA Technologies	C50000	
Aquent Systems	C70000	
E		
Earthshaker Corporation	C40000	

3:12 pm 33%			
Items			
A			
A00001	J.B. Officeprint 1420	400.00 \$	>
		-802	
A00002	J.B. Officeprint 1111	200.00 \$	>
		1,839	
A00003	J.B. Officeprint 1186	300.00 \$	>
		-389	
A00004	Rainbow Color Printer 5.0	500.00 \$	>
		1,861	
A00005	Rainbow Color Printer 7.5	400.00 \$	>
		-800	
A00006	Rainbow 1200 Laser Series	400.00 \$	>
		2,920	
B			
B10000	Printer Label	1.00 \$	>
		3,371	
C			
C00001	Motherboard BTX	400.00 \$	>
		-1,133	

3:12 pm 32%		
Customers		
Customer   Lead		
A		
ADA Technologies	C50000	
Aquent Systems	C70000	
E		
Earthshaker Corporation	C40000	
M		
Mashina Corporation	C42000	
Maxi-Teq	C20000	
Microchips	C30000	
O		

# SAP Business One Sales

- Clear sales oriented functional scope
- Using service layer and Fiori-style design
- SAP HANA analytics elements\*
- Easy setup, user-oriented, high usability
- New, affordable license option
- Comprehensive security
- Detailed introduction and free trial:



# Thank you.

SAP Business One | Global Rollout

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