



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

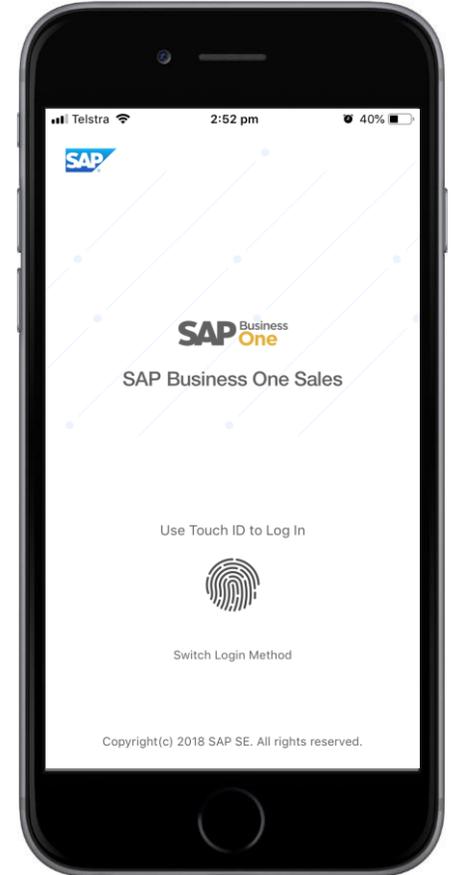
- Tailored for sales roles, holistic CRM management drives sales productivity
- Insight to customers, deals, predictability in sales operations

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



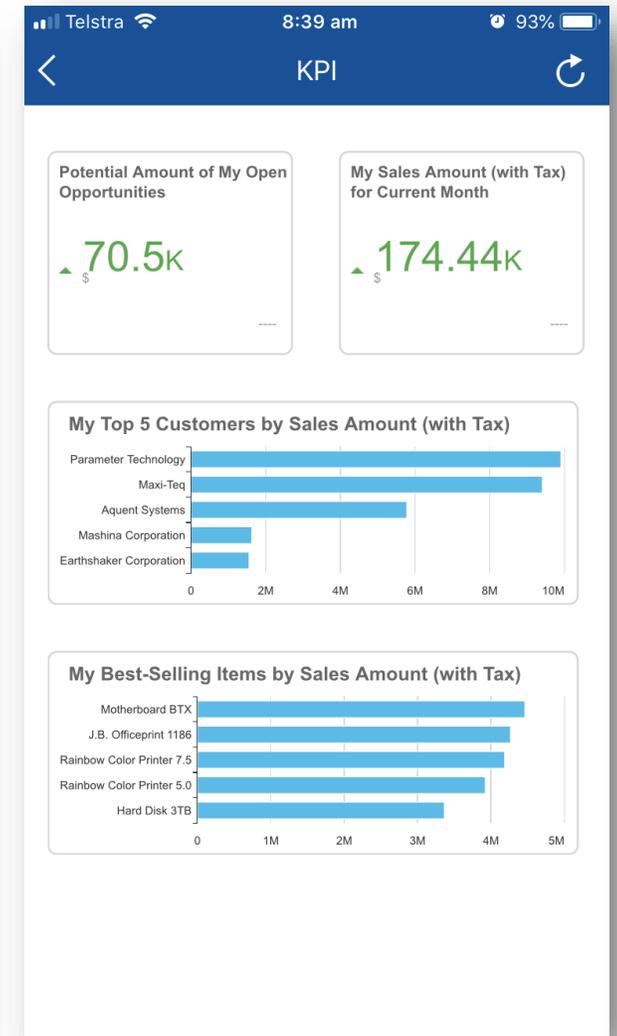
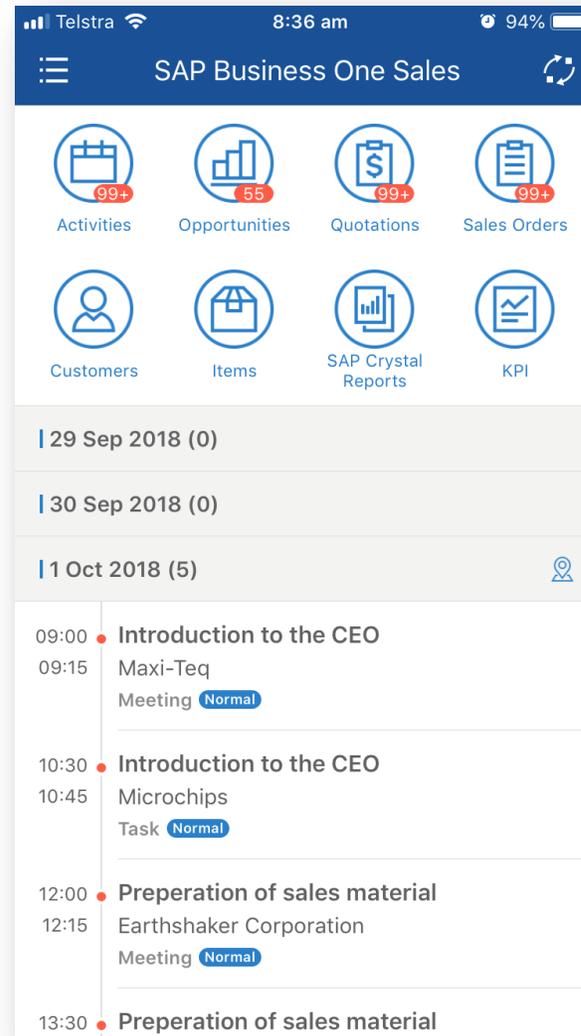
SAP Business One Sales - Getting Started

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

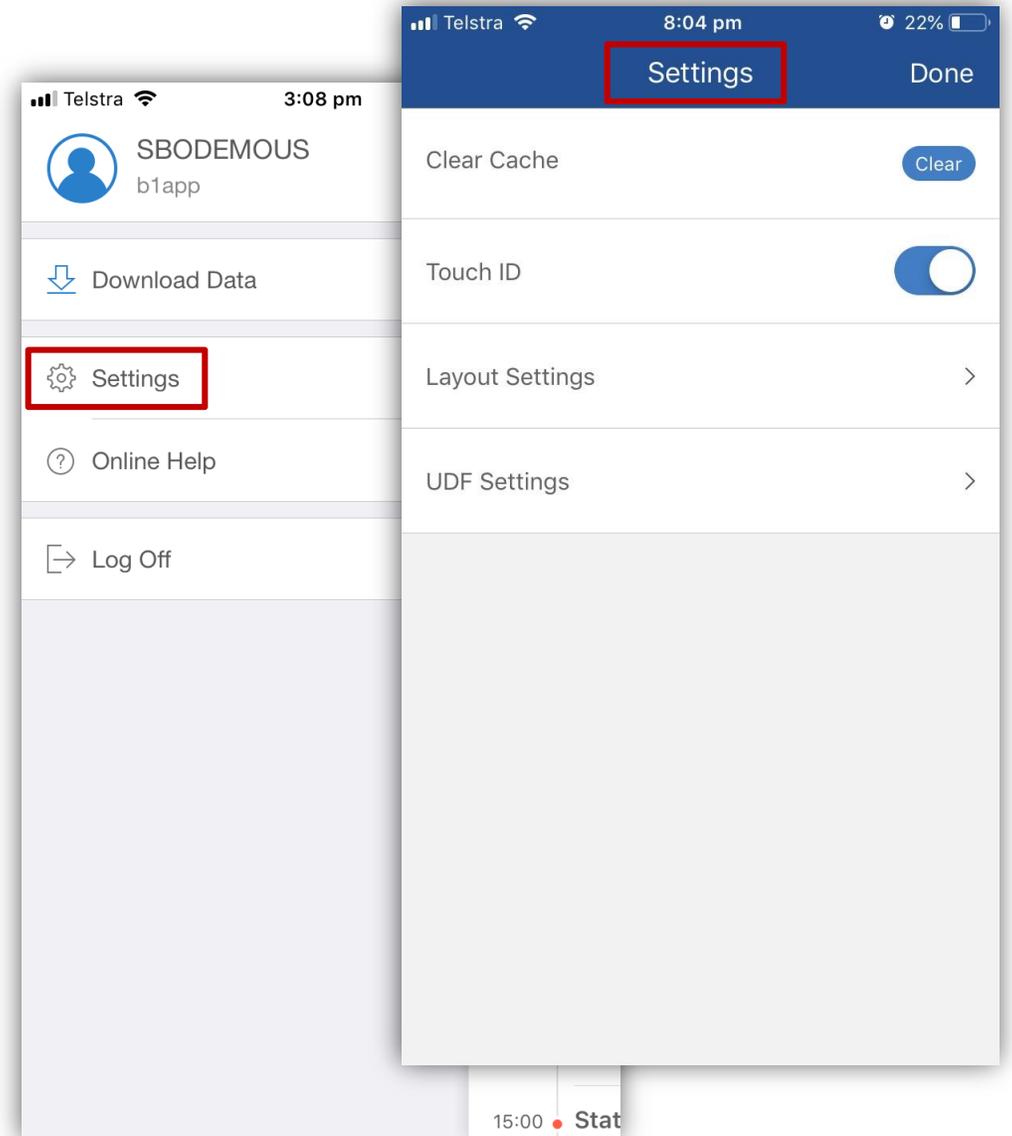
Connection flow:



SAP Business One Sales - Configuring Settings

Features:

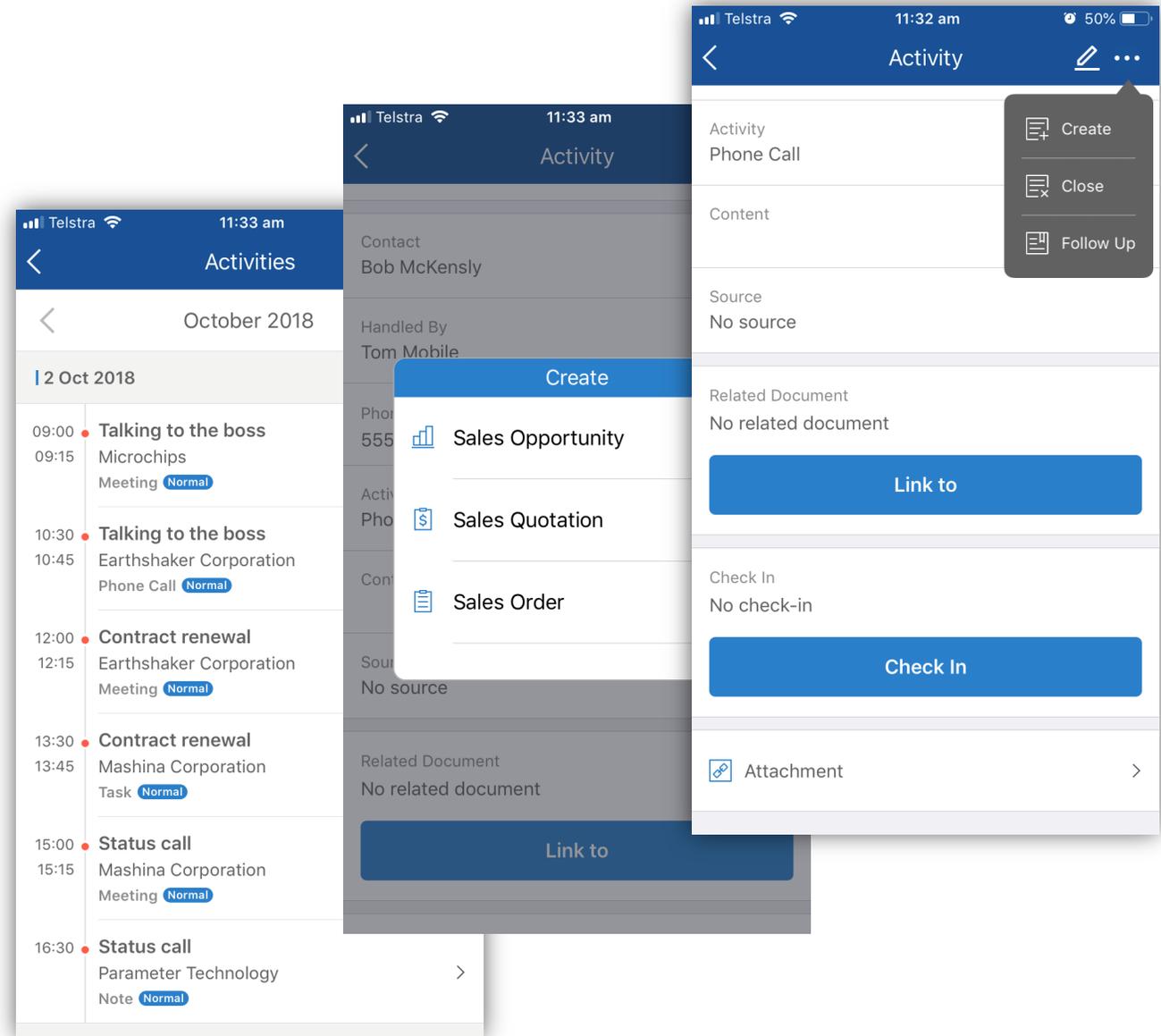
- Display your company name and user code.
- Download and synchronize customer and item data for offline mode
- Clear Cache allows you to clear your current users data
- Define your document layout settings
- Display or hide user-defined fields (UDFs).
- Touch ID/Face ID configuration available depending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



SAP Business One Sales - Managing Activities

Features:

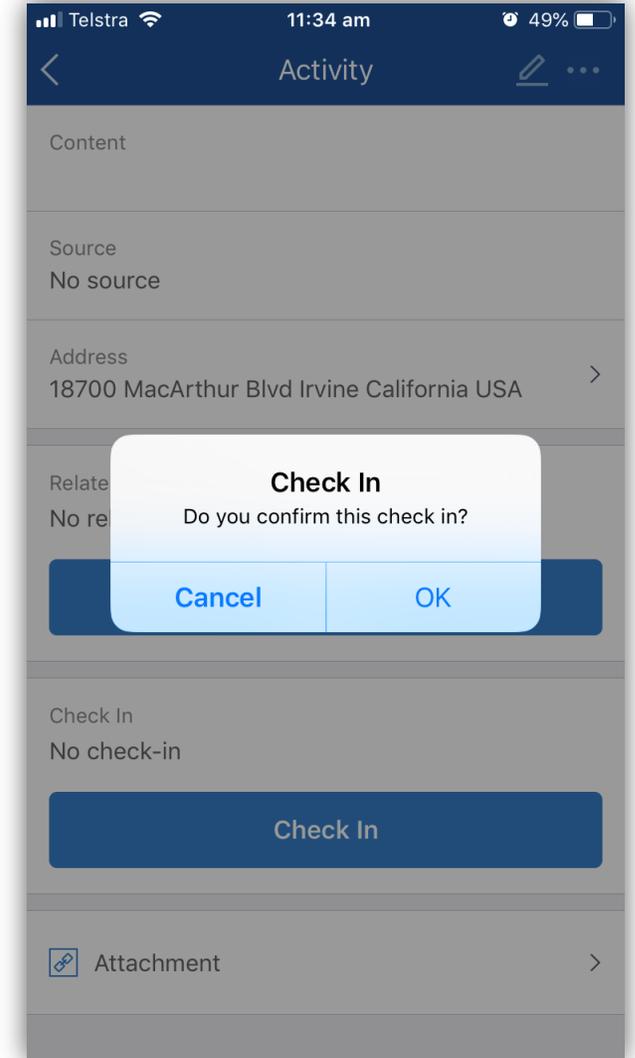
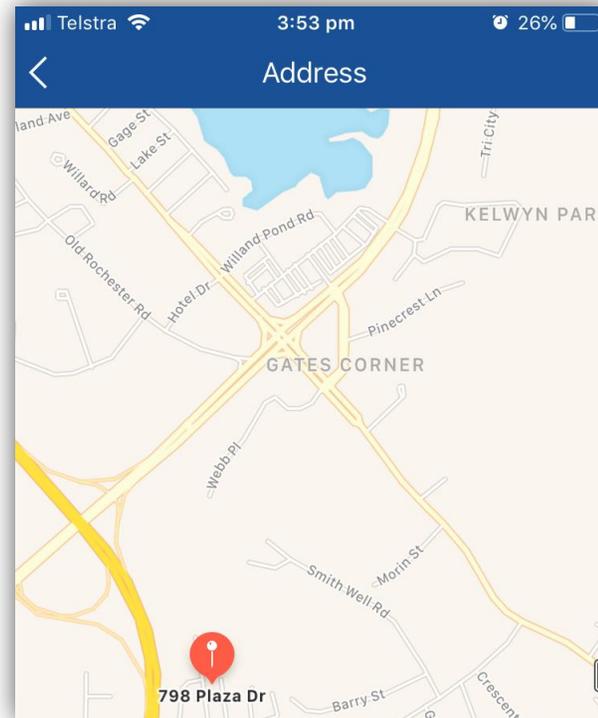
- View activities assigned to you in a calendar format
- Edit and close existing activities or create new activities
- Create follow-up activities
- Create sales opportunities, quotations, or orders based on activities
- Assign activities to a group recipient list
- Link related documents such as sales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

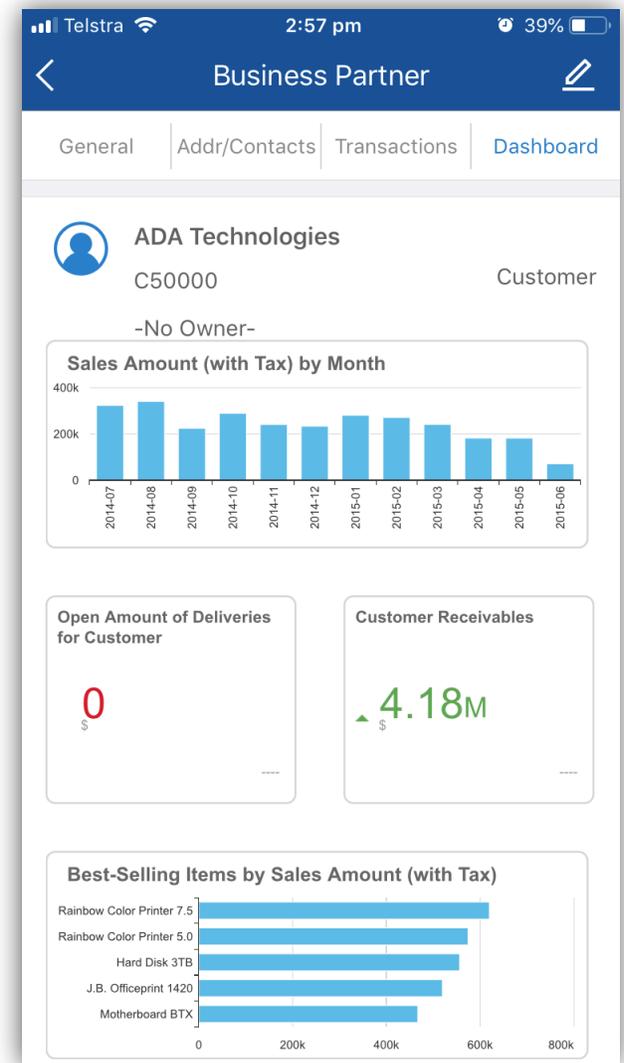
- Reports the location of an activity for every stage of the sales process
- Check-in data can be used for effective monitoring of activities by sales managers using a dedicated activity report within the SAP Business One client
- Multiple users assigned to the same activity can check in.
- Embedded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

Item ID	Description	Unit Price	In Stock
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

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

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 \$

Posting Date		
Doc. No.		
BP Name		
Doc. Total		
Delivery Date		
● 3433 - Microchips	2018-10-01	Open 39,664.68 \$
● 3434 - 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

The screenshot shows the 'Opportunities' list view in Pipeline mode. The 'Pipeline' tab is highlighted with a red box. The list contains several opportunities with their respective values and dates.

Opportunity ID	Value	Date
787 -	2000.0	2018-10-12
782 -	4000.0	2018-10-12
793 -	1000.0	2018-10-12
780 -	3000.0	2018-10-12
799 -	4000.0	2018-10-12
774 -	3000.0	2018-10-12
801 -	3000.0	2018-10-12
803 -	4000.0	2018-10-12

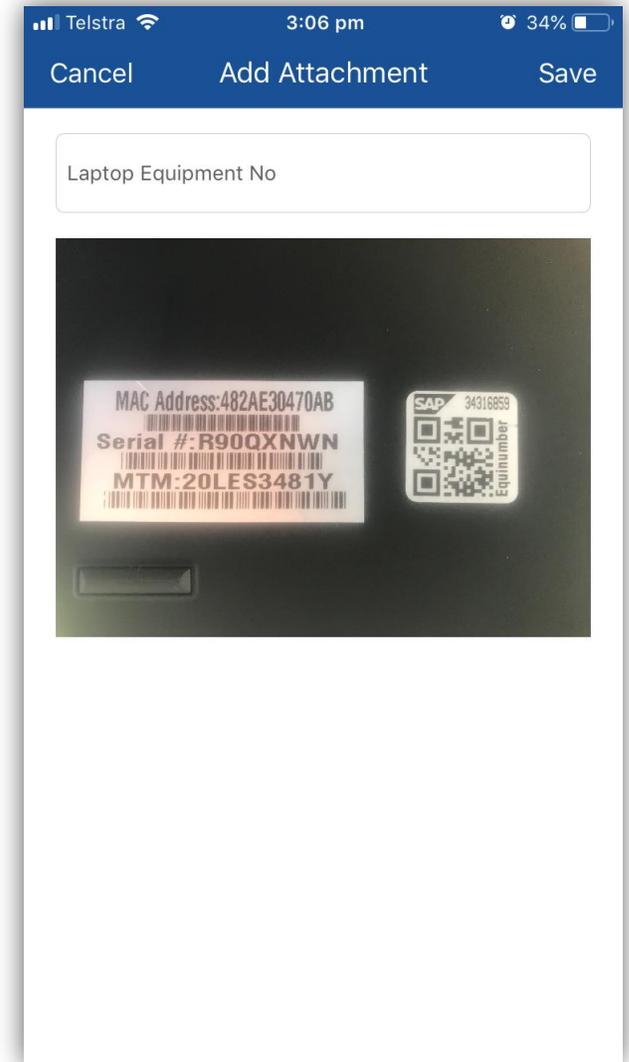
The screenshot shows the 'Pipeline' view for a specific opportunity. The 'Pipeline' tab is highlighted with a red box. The pipeline stages are listed vertically, with a green dot indicating the current stage.

Stage	Value	Date
Lead		
1st Meeting		
2nd Meeting		
13 -	50000.0	2017-01-01
Quotation		
Negotiation		
Order		

SAP Business One Sales - Managing Attachments

Features:

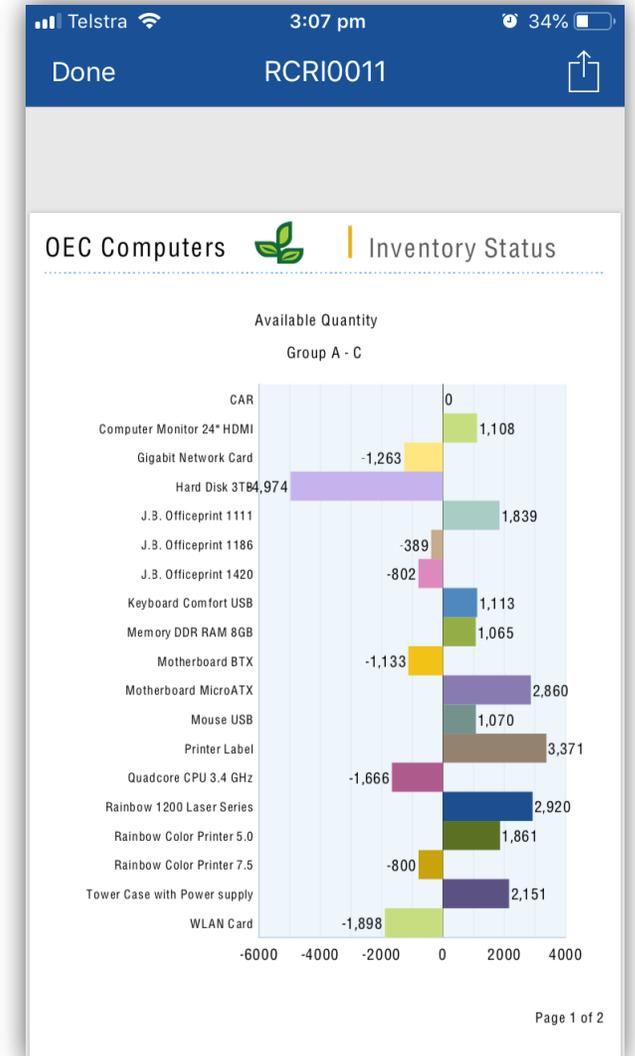
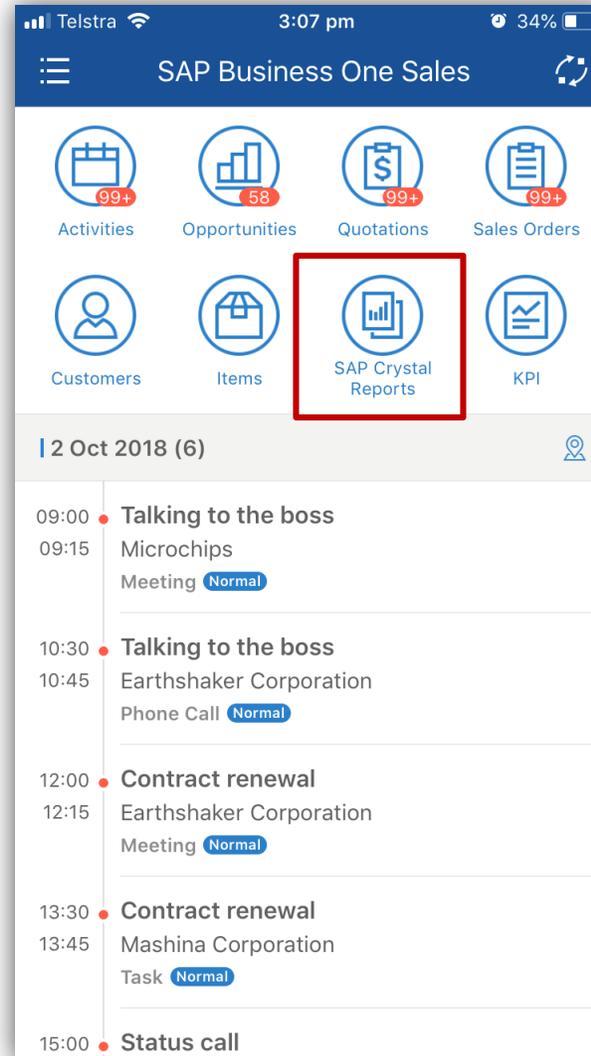
- View, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls
- Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears
- Upload attachments 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:

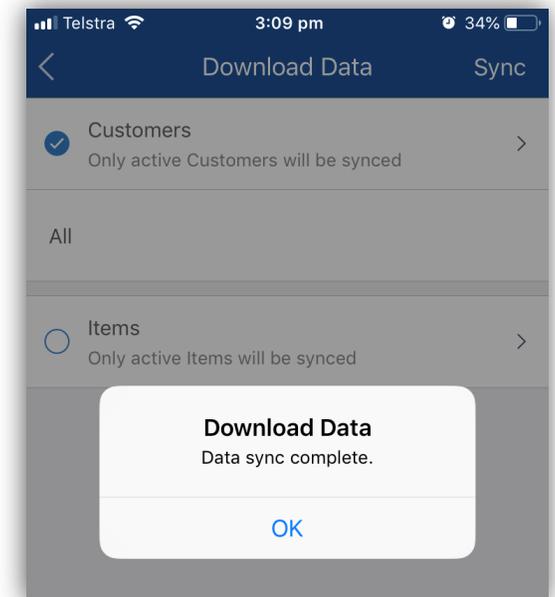
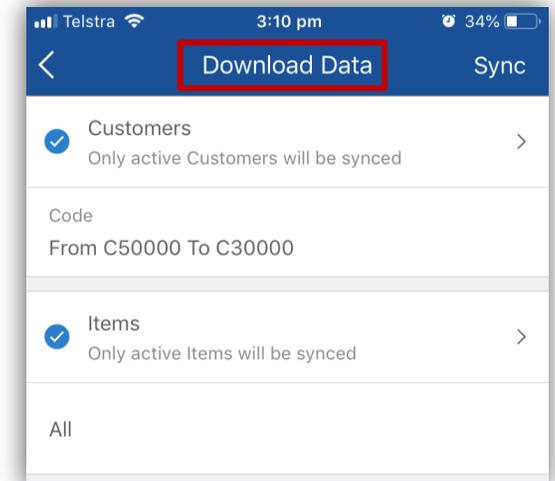
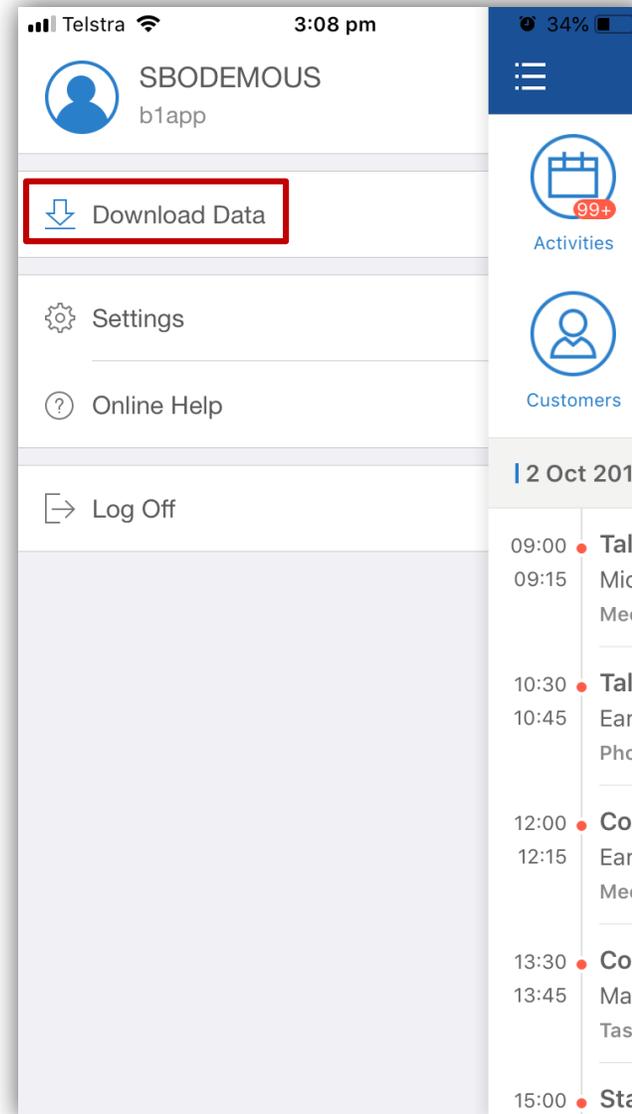
- New Crystal Report menu option for SAP Business One Sales.
- Easily view your SAP Business One crystal reports to make informed decisions on the run.
- Download and/or share your crystal reports easily with others.



SAP Business One Sales - Data Synchronization for Offline Mode

Features:

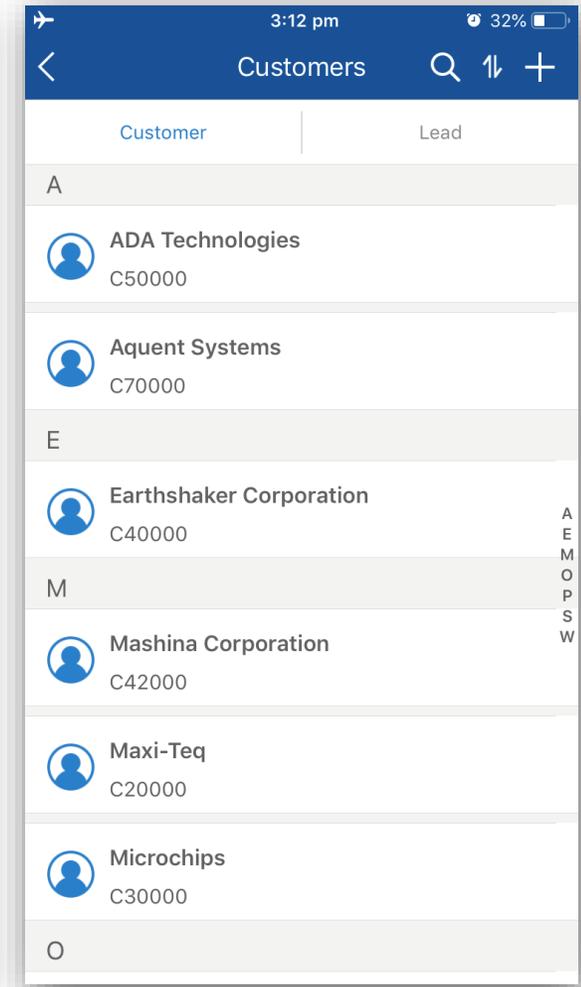
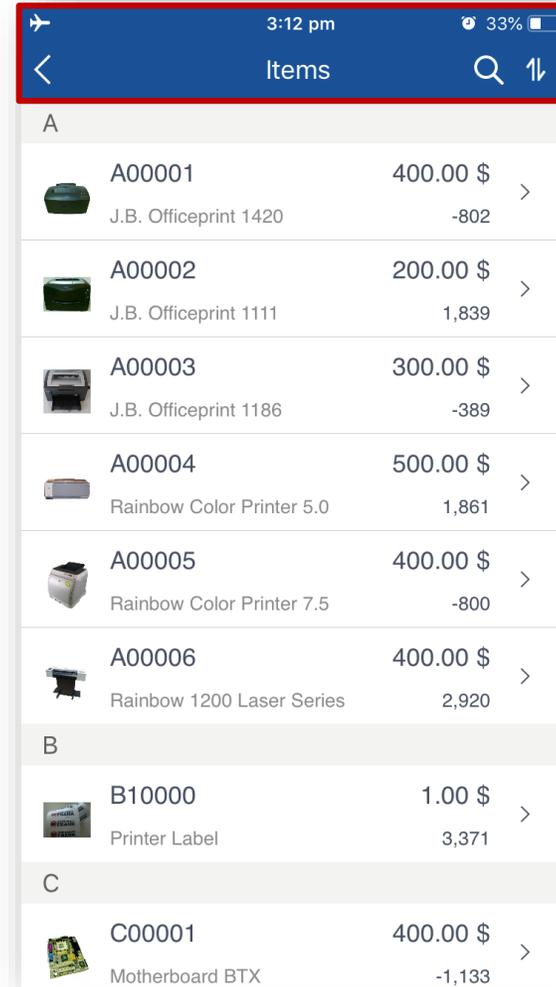
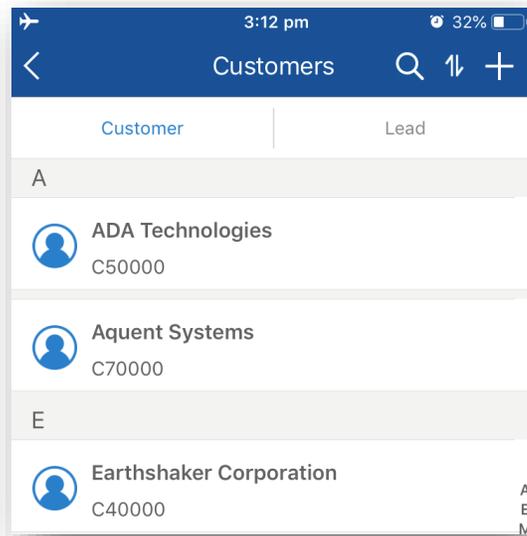
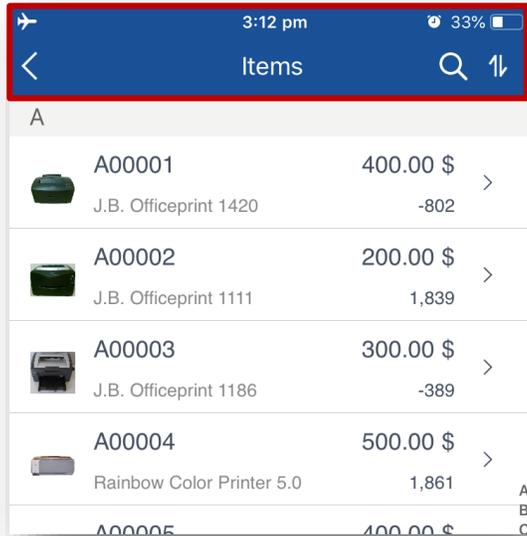
- Business Partner & Items details can be downloaded in batches and viewed in offline mode.
- Large numbers of business partner data and items are able to be synchronized to your local mobile device easily.



SAP Business One Sales – Caching for Offline Mode

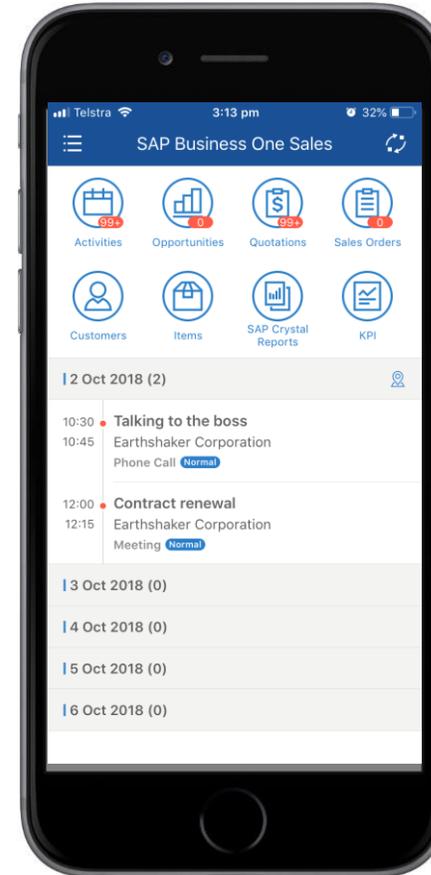
Features:

- 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.



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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