User Guide | PUBLIC
2026-05-05

Working with SAP Business One Mobile App for Android

Applicable Releases: SAP Business One 9.1 PL05 and later, SAP Business One 9.1 PL05, version for SAP HANA and later, SAP Business One Cloud 1.1 PL02 and later, SAP Business One mobile app 1.2.x for Android

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1 Introduction

With the SAP Business One mobile app for Android, you can process approval requests, view reports and business content, manage business partner data, monitor sales opportunities, and much more.

Key features:

- **Sales Catalog** (only available for iPad) – View, search for, compare, and create sales quotation or sales order on the fly for sales items, using visual and appealing display layout.
- **Activities** – Get the list of your activities within one month sorted by date. You can update existing activities and add new ones.
- **Approvals and alerts** – Get alerts on specific events – such as deviations from approved discounts, prices, credit limits, approved or rejected documents, or targeted gross profits – and view approval requests waiting for your immediate action. Drill into the relevant content or metric, including draft documents, before making your decision.
- **Business partners** – Access business partners' information including addresses, phone numbers, and contact details; view historical activities and special prices; create new business partners and new activities. In addition, you can synchronize contact persons phone numbers with the phone book on your device.
- **Inventory and price lists** – Monitor inventory levels, access detailed information about your products, including purchasing and sales price, available quantity, and product specifications, and view price lists.
- **Sales documents** (Sales quotations, Sales orders, and Deliveries) – Create, view, update, cancel, and search for sales quotations and sales orders, and submit drafts of sales quotations and sales orders for approval. You can also create sales orders based on sales quotations, and view deliveries. In addition, you can create, update, view, and close activities related to sales documents.
- **Sales opportunities** – Create, view, edit, and search for sales opportunities; view, add, and edit stages for sales opportunities.
- **Service contract and service call** – View and edit service contracts; process and close service calls, create and view solutions, and look up related service calls from service contracts or customer equipment cards.
- **Reports** – Refer to built-in reports created with SAP Crystal Reports software, version for the SAP Business One application, that present key information about your business. You can add your customized reports and easily share them.
- **Dashboards** – View predefined dashboards (sales analysis, cash flow, and purchase quotations) in normal and full-screen mode.
- **Attachments** – View, download, and upload attachments to business partners, items, activities, sales opportunities, service calls, and sales documents.

Requirements for mobile devices:

Android OS 8.0 or higher.

Requirements for SAP Business One solution:

- You have installed one of the following:
  - SAP Business One 9.1 (PL) 05 or higher
  - SAP Business One 9.1, version for SAP HANA (PL) 05 or higher

  > ### Note
  >
  > SAP Business One mobile app 1.2.x for Android is also available when using SAP Business One Cloud 1.1 (PL) 02. For further information, see the *Administrator's Guide for SAP Business One Cloud* on the product page.

- You have installed Integration component for SAP Business One (B1iC)

  > ### Note
  >
  > SAP Business One creates a user with B1i user code for each company database. The default process requires that you set the same password for each company database. The integration framework uses the B1i user to connect to SAP Business One, for example for authentication when using the mobile solution. Make sure that the password that you have provided during integration framework installation is the same that you set in SAP Business One.

For further information about **installing and upgrading SAP Business One**, see SAP Business One Administrator's Guide or SAP Business One Administrator's Guide, version for SAP HANA. For **security** reasons, the SAP Business One mobile app for Android neither stores nor caches business data on the device. It does not support any offline use. A server connection needs to be established to open and use the app.

While this document is for all users, some **links** included in this document lead to sites that are restricted to SAP Business One partners who must have a valid user name and password to access.

2 Installing the SAP Business One Mobile App

To download and install SAP Business One mobile app for Android on your Android device, follow this link: https://play.google.com/store/apps/details?id=b1.mobile.android

3 Configuring the SAP Business One Solution

This section explains the tasks of the system administrator in setting up and managing SAP Business One mobile app for Android. These tasks are performed in SAP Business One or SAP Business One, version for SAP HANA, and in Integration Framework for SAP Business One.

3.1 Activating Mobile App Users

Procedure

To enable SAP Business One users to use the mobile app, make the following settings.

1. From the SAP Business One *Main Menu*, choose *Administration* > *Setup* > *General* > *Users*.
2. In the *Users - Setup* window, specify the user for whom you want to make the mobile settings and select the *Mobile User* checkbox.
3. In the *Mobile Phone* field, enter the user's mobile phone number. If you intend to use SAP Business One mobile app on a device which is not a mobile phone and where you have no number, choose a fictitious mobile phone number.
4. In the *Mobile Device ID* field, enter the device ID of the respective mobile device.

   > **Note**
   >
   > If the *Mobile User* checkbox is selected, this field is mandatory. To find the device ID, launch the SAP Business One mobile app installed on your device. In the *Logon* page, tap Settings. The device ID appears in the *Device ID* field, in the *Logon Settings* section.

5. To enable a user to use the app by two different mobile devices, enter the device ID of both devices. Use "/" as the separator. For example: `AE45FG67816ET98ZV6523BNH8I /1QAZXSW23EDCVFR45TGB678YHN`.

   > **Note**
   >
   > It is possible to logon to one mobile device at a time. If a user tries to log on to one device while logged on to the other device, a warning appears and the session automatically ends.

6. Choose the *Update* button and then choose *OK*.

   > **Note**
   >
   > If you are working with SAP Business One Cloud 1.0 or higher, choose the *Send Mobile Settings* button. An e-mail with a hyperlink containing all configuration details will be sent automatically to the mobile device of the given user. For more information, see the *Configuring Mailer* and *Registering Integration Components* sections in the SAP Business One Cloud Administrator's Guide, and the Configuring the SAP Business One Mobile App When Working with SAP Business One Cloud [page 17] section in this guide.

3.2 Setting Up License

If you have created a new user with mobile settings or added mobile settings to an existing user, a message appears reminding you to ensure that the mobile user has a B1i license.

SAP Business One mobile app for Android is available for the following SAP Business One named user types with no additional license fee:

- Professional
- Limited Financial
- Limited Logistics
- Limited CRM
- Starter Package
- CRM Sales User (standalone, legacy license type)
- CRM Service User (standalone, legacy license type)

For more information about the mobile app functions available for each license type see the Mobile App Function Availability Based on SAP Business One License Type [page 54] section in this document.

To assign a user a B1i license, follow the steps below.

1. From the SAP Business One *Main Menu*, choose *Administration* > *License* > *License Administration*. The *License Administration* window appears.
2. In the *Allocation* tab, first select the relevant users and then select the *Used* checkbox for the *B1i user* type license.
3. Choose the *Update* button.

3.3 Configuring for SAP Crystal Reports on SAP Business One

Context

To make a report created with SAP Crystal Reports visible within the mobile app, follow the steps below.

Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* > *Setup* > *General* > *Report and Layout Manager*.
2. In the navigation pane on the left, select the report you want to display on the mobile device.
3. Select the *Visible for Mobile* checkbox.

   This checkbox is visible only for reports in the SAP Crystal Reports format, not for reports in other formats.

> ⚠ Caution
>
> SAP Business One does **not** check whether the report is suitable for displaying on a mobile device.

4. To save your settings, choose *Update*.

> ⓘ Note
>
> The resolution of the mobile device determines how the report is displayed. Check whether the report is suitable for displaying on a mobile device.

3.4 Configuring for SAP Crystal Reports Deployed on SAP Business One analytics powered by SAP HANA

This topic shows you how to enable viewing SAP Crystal reports deployed on SAP Business One analytics powered by SAP HANA in the mobile app.

Prerequisites

- You are running SAP Business One analytics powered by SAP HANA 1.1 or higher.
- You are running SAP Business One 8.82 PL12 or higher, or SAP Business One 9.0 PL04 or higher.
- You are running SAP Business One mobile app 1.9.3 or higher for iOS, or 1.0.1 or higher for Android.

Context

If you are using SAP Business One analytics powered by SAP HANA and would like to enable viewing in the mobile app SAP Crystal reports which are deployed on SAP Business One analytics powered by SAP HANA, proceed as follows:

Procedure

1. Step 1: Configuring Integration Framework for SAP Business One [page 11]
2. Step 2: Editing Connection String [page 11]

3.4.1 Step 1: Configuring Integration Framework for SAP Business One

Procedure

1. In the *Integration Framework for SAP Business One* page, choose: *SLD* > *B1i Server* > *B1A Server* > *Edit*.
2. Change the HTTA information under *Connectivity List (Active)* as follows:

   destHost: **<B1A Server>**
3. Choose *Save*.
4. Choose *SLD* > *B1i Server* > *B1A DB* > *Edit*
5. Under *Connectivity List (Active)*, update the JDBC information as follows:
   - *Driver*: **com.sap.db.jdbc.Driver**
   - *URL*: **jdbc:sap://<B1A Server>:30015?currentschema=<Schema>;databaseName=<Database Name>;**
   - *Username*: **<Your SAP HANA Database User Code>**
   - *Password*: **<Your SAP HANA Database Password>**
6. Choose *Save*.

3.4.2 Step 2: Editing Connection String

Procedure

1. Open a report in the SAP Crystal Reports for SAP Business One designer. Choose either the HDBODBC connection for 64 bit, or HDBODBC32 for 32 bit from *Data* > *Available Data Sources*.
2. Select the *Enter Connection String* radio button, and in the *Connection String* field enter the name of the target company database as schema in command, or import the table from the target company database.

   > ✤ Example
   >
   > Connection String: **DRIVER={HDBODBC32};UID=SYSTEM;PWD=Password;SERVERNODE=192.168.1.4:30015;DATABASE=SBODEMO**;
   >
   > Command: **SELECT "ItemCode", "ItemName" FROM "SBODEMO"."OITM"**
3. Repeat the above steps for each target company database.

3.5 Configuring for SAP Crystal Reports Based on SAP HANA

Context

This procedure is relevant only if you are using SAP Business One 9.0, version for SAP HANA PL02, and would like to enable viewing in the mobile app SAP Crystal reports based on SAP HANA.

Procedure

1. Open the report in the SAP Crystal Reports for SAP Business One designer. Choose either the B1CRHPROXY connection for 64 bit, or B1CRHPROXY32 for 32 bit from *Data* > *Available Data Sources*

   > **Note**
   >
   > If HDBODBC or HDBODBC32 is used as connection, replace it by B1CRHPROXY or B1CRHPROXY32 respectively.

2. Select the *Enter Connection String* radio button, and in the *Connection String* field remove "Schema@" and "Package@" from all the parameters of commands and tables if exist.

   > **Example**
   >
   > Connection String: `DRIVER {B1CRHProxy32};UID=SYSTEM;PWD=Password;SERVERNODE=192.168.1.4:30015;DATABASE=SBODEMO`;
   >
   > Command: `SELECT "ItemCode", "ItemName" FROM "OITM"`

3. Repeat the above steps for each target company database.

3.6 Setting Up Add-Ons to Run Within the Mobile App

Context

For SAP Business One add-ons that run on mobile devices and are delivered by partners, make the settings described below.

Procedure

1. From the SAP Business One *Main Menu*, choose *Administration* > *Add-Ons* > *Mobile Add-On*.
2. In the *Mobile Add-On - Setup* window, enter the relevant data in the *Code*, *Name*, *Entry URL*, and *Provider* fields.
3. In the *Type* field, choose *Module* for Android devices. *Home* is not applicable for Android.
4. In the *View Style* field, specify the relevant view:
   - *Page-Universal* - for add-on that works on Android devices
   - *Full Screen - iPad* - not applicable for Android
   - *Landscape Only - iPad* - not applicable for Android
5. In the *Logon Method* field, specify whether the add-on requires authentication for logon:
   - *B1i Framework* -Select this option if add-on back-end scenarios are implemented on B1i Framework and the same session ID will be shared with this add-on.
   - *Standard Logon* - Select this option for add-on that requires user logon authentication. In this case a logon message box appears asking for user name and password.
   - *No Control* - select this option for add-on that does not require any authentication to be provided by SAP Business One, or for add-on that controls independently everything that has to do with authentication.
6. To save your settings, choose *Update*.

3.7 Configuring the SAP HANA Server

Context

> **Note**
>
> This section is relevant only when working with SAP Business One, version for SAP HANA;.

Procedure

1. In the *Integration Solution for SAP Business One* page, choose: *SLD* > *B1i Server* > *B1A Server*. The *B1A Server* area appears. Choose the *Edit* button.
2. In the *HTTA* section (under *Connectivity List (Active)*), enter in the following fields (all of them are mandatory) the respective details as appear in the B1A Server:
   - *destProtocol*
   - *destHost*
   - *destPort*

> ### Example
>
> The URL for accessing the B1A Administration Console is: https://<IP Address>:40000/Enablement the above mentioned fields are filled in as follows:
>
> - *destProtocol*: **`https`**
> - *destHost*: **`10.58.114.44`**
> - *destPort*: **`40000`**

3. Choose *Save*.

3.8 Configuring the B1i Mobile Scenario

Context

After completing setup and configuration tasks in SAP Business One and on your mobile device, you must configure the B1i scenario. This enables the SAP Business One mobile app to communicate with the SAP Business One database and vice versa.

Procedure

1. On the B1i server, choose *Start* > *All Programs* > *Integration Solution for SAP Business One* > *Integration Framework*.

   The *Connect to* `<server name>` window appears.
2. In the *User name:* field, enter **`B1iadmin`**; in the *Password:* field, enter the password that was set by the user when installing B1i. Choose the *OK* button.

   The *Integration Solution for SAP Business One* window appears.
3. Make sure that the test connection between the B1i Server and the company database of your mobile app is successful. Perform the following actions:

   From *SLD* > *B1i Server*, choose the company that your mobile app connects to. Make sure that the password is correct. Choose the *Test Connection* button in the *B1DI* and *JDBC* area.

   > ### Note
   >
   > In case you cannot find the company database, see 2032666.
   >
   > If the test connection is not successful, you may need to go to the SAP Business One client to reset the password for the **B1i user**. For more information, see 2029714.
4. Make sure that the value in the *associatedSrvIP* field is the same as that in *b1Server*.

   The *associatedSrvIP* field locates in the *WSAR* area from *SLD* > *B1i Server* > *WSforMobile*.

   The *b1Server* field locates in the *B1DI* area from *SLD* > *B1i Server* to your company database.

5. Make sure that the B1A server name (value in the *destHost* field) is the same as the name used to generate the certificate. This is only relevant to view SAP HANA features in Android devices.

   The *destHost* field locates in the *HTTA* area from *SLD* > *B1i Server* > *B1A Server*. Make sure that the *destHost* domain can be accessed from external network.

   For more information, see 2048889, point 6.

6. Make sure the *sap.B1Mobile* scenario is active (By default, *sap.B1Mobile* is activated.)

   Choose *Scenarios* > *Control*. In the *Scenario List*, make sure the *sap.B1Mobile* checkbox is selected.

4 Configuring the SAP Business One Mobile App

Prerequisites

Your mobile device is running on Android 8.0 or above.

Context

To connect to your SAP Business One company database, follow the steps below.

Procedure

1. Tap the *SAP Business One* launcher icon on your Android device. The *Logon* page appears.
2. Tap *Settings*.
3. On the *WEB SERVICE* section, specify the following information:
   - *Server*: Server address (either IP or server name).
   - *Port*: Default ports of integration solutions for SAP Business One are 8080 (http) and 8443 (https). If you enter an incorrect port for a server connection, the app times out in 75 seconds by default.
   - *SSL*: Select this checkbox to use SSL (https) between SAP Business One and your Android device. This setting must comply with the protocol and assigned ports on the server side.

   > → Recommendation
   >
   > Use a secure communication channel. Keep the SSL checkbox selected (which is the default value).

   > ⓘ Note
   >
   > For more information about configuring https, see the *Security Aspects Related to the Mobile Solution* section in SAP Business One Administrator's Guide or SAP Business One Administrator's Guide, version for SAP HANA.
   >
   > Be aware that SAP cannot cover all possible security aspects due to customer-specific requirements and conditions. The mobile app needs to be embedded into each customer's specific security concept.
4. On the *LOGON SETTINGS* section, specify the following information:
   - *Company DB*: Name of the company database to which you want to connect (mandatory field). The mobile app logs on to this company.
   - *User Code*: Used to log on to the SAP Business One company database specified in the *Company DB* field.

- If you are using an on-premise solution and have not enabled Single Sign-On (SSO), it is the value of the *User Code* field in the *Users - Setup* window in SAP Business One.
- If you are using an on-demand solution, or if you are using an on-premise solution and have enabled SSO, it is the value of the *Bind with Microsoft Windows Account* field in the *Users - Setup* window in SAP Business One.

If you specify a user code in this field, when you log on to the app you need to enter only your password.

- *Phone Num*: User's mobile phone number; that is, the value in the *Mobile Phone* field of the *Users - Setup* window in SAP Business One.
- *Demo System*: When the demo system is *ON*, the logon dialog offers the user access to the public demo system. Currently, the supported demo server is *Germany - powered by SAP HANA* (in *Settings* > *Demo Server* field).

> **Note**
>
> The app uses the language that you use on your device. All SAP Business One languages are supported.

4.1 Configuring the SAP Business One Mobile App When Working with SAP Business One Cloud

Procedure

1. In your device, open the e-mail you have received from SAP Business One administrator. Click the hyperlink that appears in the e-mail.
2. SAP Business One app is automatically launched and saves the relevant information in the *Settings* page in the app.
3. In the *Logon* page enter your password, and tap *OK*. The mobile app automatically connects to the company database recorded in the *Settings* page.

4.2 Verifying the Connection Between Mobile Device and B1i Server

Context

Make sure that the integration framework server is accessible from your mobile device.

Procedure

1. Copy the URL from the integration framework server.

   Log on to the integration framework, choose *Scenarios* > *Control*. From the *sap.B1Mobile* scenario, choose *Trigger*. Copy the URL including the port number, for example, `https://<server_ip_address>:8443`.

   > **Note**
   >
   > `<server_ip_address>` must be the same as the server setting in the mobile app setting.

2. Paste the URL in the browser of the mobile device.

   If the logon page of the integration framework is displayed, it means the integration framework can be pinged successfully from the mobile device. Otherwise, you get an error message: *XCL198 HTTP-access currently not allowed from remote clients, as B1iP runs in local-mode or safe-mode*.

   For more information, see 1776825.

   > **→ Recommendation**
   >
   > For security reasons, it is not recommended to use the http connection and port 8080.
   >
   > If you use http and port 8080, you must switch off SSL in your mobile device. At the same time, you must also change the *Enforce Secure Transport* field to false and reactivate the *sap.B1Mobile* package. Perform the following steps:
   >
   > 1. Log on to the integration framework, choose *Scenarios* > *Authentication*.
   > 2. In the *User-defined Authentication Identifier* field, specify the *sap.B1Mobile* package. In the *Enforce Secure Transport* field, select *false*.
   > 3. Reactive the package by choosing *Control* tab, deselect the *sap.B1Mobile* package and select it again.

4.3 Deploying Certificates

To ensure the highest security standard for your company and your business data, SAP introduced the exclusive use of valid SSL certificates. In SAP Business One, the System Landscape Directory and the Service Layer components enforce secure connection via HTTPS encryption. You need to ensure that your mobile device is also secured by the certificates.

- Purchased certificate (Recommended):
  We recommend that you use a purchased certificate (for example, PKCS12 certificate). If you use a purchased certificate, you normally don't need to deploy the certificate to your mobile device. If you are asked to do so, please contact your certificate vendor.
- Self-signed certificate:
  If you use a self-signed certificate, import the certificate created for the integration framework server to your mobile device.
  For examples of how to obtain and install valid certificates, see SAP Note 2019275.

4.4 Troubleshooting: SAP HANA Features Don't Work in SAP Business One Mobile App

This topics shows you what to do when some SAP HANA features do not work in the SAP Business One mobile app.

Context

When using the SAP Business One mobile app, you find that the following SAP HANA features do not work:

- Cash Flow Forecast
- Enterprise Search
- Pervasive Dashboard
- Dashboard (Sales Analysis)

Procedure

- If this happens after you upgrade the SAP Business One mobile app for Android to 1.2.2 or later, you need to install the B1A certificate on your mobile device as follows:
  1. Export the B1A certificate from System Landscape Directory (SLD).
     1. In a Web browser, enter the URL of the SLD, Mobile Service or Analytics Platform and then press `Enter`.
     2. In the address bar, click the security report icon.
     3. Click to view the certificate. Check the *Issued to* field.
     4. In the *Certificate* window, on the *Details* tab, choose *Copy to File*.
     5. In the *Certificate Export Wizard* window, choose *Next*.
     6. Select the *DER encoded binary X.509 (.CER)* format, and choose *Next*.
     7. Enter a name and the full destination path for the file, or click *Browse* and navigate to the destination path and then enter a file name.
     8. Click *Finish*.
     9. Copy the certificate file via a microSD card to the Android device.
     10. Install the file on your mobile device. Choose *Settings* > *Security* > *Credential Storage* and select *Install from storage* and follow the prompts.
  2. In the *Integration Framework for SAP Business One* page, choose: *SLD* > *B1i Server* > *B1A Server* > *Edit*. In the *destHost* field, enter the B1A server hostname that is the same as in the *Issued to* field in the certificate.
- If you are running SAP Business One 9.0 PL09 Hotfix 1, version for SAP HANA, see SAP Note 2012800.
- Otherwise, proceed as follows:

1. Verify that SAP Business One analytics powered by SAP HANA is installed on the SAP HANA server.

2. Ensure that the SAP Business One company has been initialized in the SAP HANA Analytics Platform Server. If you encounter any issue with company initialization and/or re-initialization, please log an incident with component *SBO-HANA-ANA*.
   a. Log in to the SLD (URL: https://`<SAP HANA Server Address>`:`<Port Number>`/ControlCenter/)
   b. Go to the *Services* tab, find the URL of SAP HANA Analytics Platform Server and open it in your browser.
3. Ensure that the IP address and host name entry for the integration framework server is correct in the server hosts file of SAP Business One analytics powered by SAP HANA (default directory: `/etc/hosts`). You can run the following query to check the correct host name: **`select SLSPP."ParamValue" from slsp, slspp where SLSP."CompID"=SLSPP."CompID" and SLSP."CompType"='b1isrv' and SLSPP."ParamKey"='host';`**
4. Check that the dashboard is visible in the SAP Business One client.
   a. Log in to the SAP Business One client.
   b. Go to *Administration* > *System Initialization* > *General Settings* > *Cockpit*, choose *Cockpit* > *More...* and enable the dashboard.
   c. Choose *Tools* > *Cockpit* > *Enable My Cockpit*.
   d. Log out of the SAP Business One client, then log in again to check if the dashboard is visible.
5. Go to the *Integration Framework for SAP Business One* page, choose *Scenarios* > *Control* to verify that the *sap.B1Validate* package is active. The package is required to connect to SAP HANA Analytics Platform Server.
6. In the *Integration Framework for SAP Business One* page, choose *SLD* > *B1A Server* to check if the values for *destProtocol*, *destHost* and *destPort* are correct. Ensure that you can access the URL of SAP HANA Analytics Platform Server from the browser of the mobile device and from the integration framework server. Use the same protocol, server address and port number set in Step 2, for example https://<HANAAnalyticsServerAddress>:40000/Enablement/. If accessing the system , use the Analytics service configured protocol, public server address and port in the External Address Mapping of the SAP Business One System Landscape Directory (SLD) for the B1A Server SLD configuration.
7. Verify the connection between the SAP HANA Analytics Platform Server and the integration framework server. If there is any connection issue, contact your local system administrator or IT professional to resolve the issue.
   a. Open putty and connect to SAP HANA Analytics Platform Server.
   b. After establishing the connection by putty, enter **`curl https://<Integration Framework Server Address>:8443`** in the command line. If you are using an internal address to connect from the mobile app to the integration framework, perform the test with the internal address and port. If you are also using an external address to connect from the mobile app to the integration framework, perform the test with the external address and port, too.

Related Information

SAP Note 1924930

5 Using the SAP Business One Mobile App

Deploying Valid Certificate on B1i Server and Android

Starting from release SAP Business One mobile app 1.1.x for Android, the app checks the certificate validity when using SSL connection. **Valid certificate is mandatorily required for servers to be accessed by mobile apps**.

See SAP Note 2019275 - *How to enable SSL connection to servers from mobile apps by deploying valid certificates* for more details.

Choosing a Company Database

By default, the mobile app logs on to the company database specified in the *Settings* page. To log on to a different company database, follow the steps below:

1. Tap the *SAP Business One* launcher icon on your mobile device. The *Logon* page appears displaying by default the company database defined in the Settings page, or the company database you logged on to in the last time.
2. Tap the company database drop down menu and select the relevant company database.
3. Enter your password and tap *OK*.

Starting Page

Once you are logged on, the starting page appears displaying list of all available modules. The mobile app retrieves authorization settings as defined in SAP Business One desktop application, controlling accessing, viewing, adding, and editing data. For detailed information regarding the authorizations required for the different functions of the mobile app, see Function-Level Authorizations for Users to Work with the App [page 52] in the appendix.

> **Note**
>
> If the app is idle for a period of time, a logon box appears, and you have to log on to the app again. By default the idle time is ten minutes. To change this value:
>
> 1. Open the integration framework Web page and choose *Scenarios* > *Authentication*.
> 2. From the *User Def. Author. Identifier* dropdown list, choose *sap.B1Mobile*.
> 3. In the *Session Timeout* field, specify a value. If you enter an incorrect port for a server connection, the app times out in 75 seconds by default.
> 4. Choose the *Save* button.

5.1 Managing Modules

All the SAP-provided modules are listed in the main page of the mobile app. If needed, you can hide selected modules. To do so follow the steps below:

1. At the top-right corner of main page, tap (the more option icon).The *Preferences* page listing all the modules appears.
2. Deselect the modules you want to hide, and tap at the top-right corner to save changes.

5.2 Setting Preferences per Module

Context

You can sort and set the display of different types of information in the various modules by using the *Preferences* option. To do so follow the steps below:

Procedure

1. On the main page of the app, tap and choose *Preferences*. The *Preferences* page that lists all the modules appears.
2. Tap the module for which you want to set or change the current preferences. The various options related to the selected module appear.
3. Make your desired changes, go back to the *Preferences* page and tap to save your changes.

5.3 Searching in the Mobile App

You can search for specific document, business partner, item, and other data that exist in your SAP Business One company database within the mobile app. The search function is available if the search icon appears. For example, when you tap the *Service Call* module, the list of service calls is displayed. The search icon appears at the top of the page.

You can search for documents and records by using the fields listed below for the different modules:

- Business Partners: Business Partner Code, Business Partner Name
- Inventory module: Item No., Item Description
- Sales Opportunities: Opportunity Name, Opportunity No., Business Partner Code, Business Partner Name
- Sales Quotation, Sales Order, and Delivery: Business Partner Code, Business Partner Name, Item No., Item Description, Doc No.

- Service Contract: Customer Code, Customer Name, Item No., Item Description
- Service Call: Subject, Customer Code, Customer Name, Item No., Item Description, Serial Number, Contract No.

To perform a search, follow the steps below.

1. Tap .
   The keyboard appears.
2. Enter a value for the search term. For example, if you are searching for a sales order, you can enter the code or name of the business partner, for whom the sales order was created, or the code or description of the item for which the sales order was created.
3. Tap the `Search` key in the keyboard.
   The list of matching results appears.

> **Note**
>
> To fine-tune the results, repeat the steps above, using a more accurate search term.

> **Note**
>
> When initiating a search on a filtered list, the search applies to the filtered list only and not to all of the records that exist in the specific module.

5.4 Using the Enterprise Search

Context

> **Note**
>
> This option is only available for SAP Business One, version forSAP HANA, and SAP Business One, Analytics powered by SAP HANA 1.1 PL02 (used with SAP Business One 8.82 PL13 or SAP Business One 9.0 PL06 or higher) and only on tablets.

Procedure

1. Tap the search box.

   The keyboard appears.
2. Enter a value for the search term and tap the Search key in the keyboard.
3. The Enterprise Search page appears, displaying the matching results.
4. Tap on each of the following result types to view the respective module:
   - Business Partner

- Inventory
- Sales Opportunity
- Sales Quotation
- Delivery
- Service Solution
- Service Call

The *Enterprise Search* page remains open in the background. To return to the *Enterprise Search* page, tap the yellow ribbon at the top of the screen.

5. To close the *Enterprise Search* page, tap *Close*.

5.5 Managing Activities in the Activities Module

In the *Activities* module, you can:

- View a list of your activities for the current month.
- Synchronize the activities to the calendar on your mobile device.
- Add, edit, and close your activities which are linked to business partners, opportunities, quotations, orders, or service calls.
- Create follow up activities.

5.5.1 Viewing and Processing Existing Activities

Procedure

1. In the *Modules* tab, tap *Activities*.

   A list of existing activities for the current month appears. By default, the activities in the current month are displayed, sorted by date. You can tap ◀ or ▶ to view activities in the previous or next month.
2. Tap an activity to view its details on the *Activity Details* page.
3. To make changes to the activity, tap , and then tap to save your changes.
4. To create a follow-up activity, tap and choose *Follow-Up Activity*. A new activity is created, containing all the information from the original activity. Make the relevant updates and tap .
5. To close an activity, tap and choose *Close Activity*. The status of the activity is set to *Closed*.

5.5.2 Adding New Activities

Procedure

1. In the *Modules* tab, tap *Activities*. A list of the existing activities for the current month appears.
2. Tap .

   The *Add Activity* page appears. Assign the required business partner.
3. Enter any additional details.

   > ⓘ Note
   >
   > - The available options under *Subject* field depend on the selection made in the *Type* field.
   > - In the *Link To* field you can assign a sales document to the activity. This option is not available when creating an activity for a vendor.
4. Tap .

5.5.3 Synchronizing Activities to Device Calendar

Context

To synchronize the activities in the SAP Business One mobile app to the calendar on your mobile device, follow the steps bellow:

Procedure

1. In the *Modules* tab, tap *Activities*.

   A list of existing activities for the current month appears.
2. Tap and choose *Sync to Calendar*.

   You can define the time span for the activities by tapping and choosing *Preferences* > *Activities* from the home page.

5.6 Working with Documents in the Approvals Module

The *Approvals* module lists all the documents pending to your approval. The number of unread documents appears on the module entry in the *Modules* tab.

In the *Approvals* module, you can:

- View documents in the approval process sorted by date or by type.
- Approve or reject documents in the approval process including travel and leave requests.

5.6.1 Approving or Rejecting Documents

Procedure

1. In the *Modules* tab, tap *Approvals*.

   A list of documents appears. The unread documents displayed as **bold** with an icon of a closed envelope. The list can contain a maximum of 50 documents. The documents are displayed by date, in a descending order, the latest document is the first and the oldest is the last. To display the documents by type, tap and select *By Type*.
2. Tap the document that you want to approve or reject.

   The *Approval Info* page appears, displaying the main details of the document draft including line details. Tap the required line to view its details. To view the complete document draft sent for approval, tap the *Doc. Type* field. The *Draft Detail* page appears, displaying the document draft including user defined fields.

   > **Note**
   >
   > When viewing an approved document, it is not possible to drill down to the document details by tapping *Doc. Type*, and the user defined fields (if exist) are displayed in the *Approval Info* page.

   Tap *Back*.
3. Tap *Approve* or *Reject*.

   The *Approve* window or *Reject* window appears accordingly.
4. Enter your remarks (optional).
5. Tap *OK*.

   > **Note**
   >
   > To stop the process, tap *Cancel*.
   >
   > The message *Approved successfully* or *Rejected Successfully* appears, in addition a respective alert is sent to the user submitted the draft document for approval:
   >
   > - Request approved - the user can tap the alert, view the details of the draft document that was originally submitted for approval, and add it.
   > - Request rejected - the user can tap the alert, view the remarks entered by the approver (if available) and the details of the draft document that was originally sent for approval.

5.7 Viewing Alerts in the Alerts Module

Context

In the *Alerts* module, you can view real-time alerts from SAP Business One, sorted by date, type, or priority. The number of unread alerts appears on the module entry in the *Modules* tab.

Procedure

1. In the *Modules* tab, tap *Alerts*.

   A list of alerts appears. The unread alerts appear in **bold**. A maximum of the most recent 50 alerts are displayed.

   The alerts are displayed by date, sorted in a descending order, from the latest to the oldest. To change the sort order, tap and choose whether to sort the alerts by type, or by priority. Tap *OK*.
2. Tap the alert that you want to view.

   The *Alert Info* page appears. You can tap fields for more information, for example, information of the item in stock. In case the alert refers to a document that was sent for approval, you can tap the alert and view details of the draft document. If the document is approved, you can add it by tapping *Add* in the *Draft Detail* page. A system message asking whether to generate a document from the draft appears. To add the document, tap *OK*.

   > ⓘ Note
   >
   > For user-defined alerts, if there is more than one alert, scroll down to the bottom to load additional alerts.
3. To return to the list of alerts, tap *Alerts*.

5.7.1 Submitting Leave or Travel Requests for Approval

Context

You can submit leave request and travel request for management approval. To use this functionality, you have to define first a respective workflow template in the back end. For more information see the guide: *How to Configure the Workflow Service and Design the Workflow Process Templates* at SAP Help Portal.

Procedure

1. Tap the *Self Service* module. The *Employee Self Service* page appears.
2. Tap *Add Leave Request* or *Add Travel Request* (as required). The respective page appears.
3. Enter all relevant information, and tap *Send*. The leave or travel requests are sent to the approving manager(s) and appear in the *Approvals* module.

5.8 Managing Business Partner Data in the Business Partners Module

In the *Business Partners* module, you can filter, view, update, add, and search for business partner information.

5.8.1 Filtering Business Partners

You can filter and view a list of business partners in the *Business Partners* module by business partner type.

Tap or swipe to one of the following filter conditions to view a list of business partners of the corresponding type:

- *My* - to display all the business partners in which the defined sales employee or buyer is the current user
- *Customer* - to display only business partners of type *Customer*
- *Vendor* to display only business partners of type *Vendor*
- *Lead* - to display a list of business partners of type *Lead*

The filter condition you apply is remembered by default the next time you enter the *Business Partners* module.

For example, if you applied the filter condition *Customer*, the next time you access the *Business Partners* module, the list of business partners will consist of business partners of type *Customer* only.

> ⓘ Note
>
> When initiating a search after applying a filter condition, the search applies to the filtered list. For example, if you applied the *Customer* filter condition and then initiated a search, the search applies to business partners of type *Customer* only.

5.8.2 Viewing Business Partner Information

Procedure

1. On the *Modules* tab, tap *Business Partners*.

A list of business partners sorted alphabetically by business partner name appears. By default, the first 20 business partners appear. To view the next 20 business partners, scroll down the list to the bottom. You can scroll down to refresh the list.

2. To view information about a business partner, tap the business partner.

   The *BP Info* page appears. It includes the following tabs:

   - *GENERAL* – Displays the account balance, credit limit, payment terms and price list assigned to the business partner, as well as contact details for the company, such as phone number, e-mail address, and Web site.
     You can tap the field *Telephone* to call or send an SMS message to your business partner.
   - *ADDR/CONTACTS* – Displays the default contact person and the default ship-to and bill-to addresses.
   - *TRANSACTIONS* – Tap the relevant category to view the documents or transactions created for the business partner:
     - *Activities* – Displays a list of activities created for the business partner
       - **To view an activity**, tap it. The *Activity Detail* page appears.

         To edit the activity, tap , make changes to the editable fields, and tap to save your changes.
       - **To add an activity**, tap .

         The *Add Activity* page appears. Specify the necessary information and tap .
     - *Special Price* – Displays the special prices of items for the business partner. To view item information, tap the item. From the item display, tap *Unit Price* to view the item's price in various price lists.
     - *Opportunities*, *Sales Quotations*, *Sales Orders*, and *Deliveries* – Display, respectively, the sales opportunities, sales quotations, sales orders, and deliveries created for the business partner. To create a new opportunity, sales quotation, or sales order, tap within each tab.
     - *Service Contract* – Displays a list of service contracts applicable to the business partner.
     - *Service Call* – Displays service calls from the business partner. You can filter the service calls by tapping the filter icon .

   To return to the list of business partners, in the upper left corner of the *BP Info* page, tap .

5.8.3 Editing Business Partner Information

Procedure

1. Display the business partner whose information you want to edit (see Viewing Business Partner Information [page 28]).
2. Tap .

   The *Edit BP* page appears.
3. Tap any detail you want to edit, make necessary changes and tap *OK*.

   For example, to change the business partner name, tap *BP Name*. Enter a new name in the text box and then tap *OK*. In addition, you can apply the following changes:

- Change the type of the business partner from *Customer* to *Vendor* and vice versa. In this case the *Sales Employee* or *Buyer* fields replace one another respectively (changing the type of business partner is possible only if no journal entries are created for the given business partner).
- Replace the default contact person with an existing one, and create a new contact person.
- Edit the exiting Ship to and Bill to addresses, change the default Ship to or Bill to addresses, and create new addresses.
- Assign the default price list.

4. After making your changes, tap .

5.8.4 Adding Business Partners

Procedure

1. On the *Modules* tab, tap *Business Partners*.

   The *Business Partners* page appears.

2. Tap .

   The *Add BP* page appears.

3. Specify the necessary information and tap .

5.8.5 Synchronizing BP Contact Persons with the Phone Book

Context

You can integrate the BP's contact persons details to the phone book on your mobile device. This way you gain access to contact persons information without having to log on to SAP Business One mobile app.

Procedure

1. To add contact person info to the mobile device phone book, tap the relevant contact person. The *Contact Info* page appears
2. Tap .
   - To create a new contact person in the device phone book, tap *Create New Contact*.
   - To add the contact person info to an existing contact person in the phone book, tap *Add to Existing Contact*. The list of contacts that already exist in the phone book appears. Tap the required existing contact. The details of the existing contact will be updated according to the contact person details from SAP Business One mobile app.

5.8.6 Creating New Contact Person Based on Contact in the Phone Book

Context

You can create a new contact person for business partner based on existing contact in your device's phone book.

Procedure

1. Open the business partner for whom you want to add the new contact person. Tap *ADDR/CONTACTS* > *All Contacts*. The list of all contacts defined for this business partner appears
2. Tap *New Contact*, and then tap *From Address Book*. The list of contacts defined in the mobile device's phone book appears.
3. Choose the contact you want to add as a contact person for the given business partner.
4. Tap *Done*.

5.9 Viewing Items in the Inventory Module

In the Inventory module, you can:

- View information about items in inventory, including the unit price of a selected item
- View quantities of an item by warehouse
- Search for items in inventory (follow the steps in Searching in the Mobile App [page 22])

5.9.1 Viewing Information about Items in Inventory

Procedure

1. On the *Modules* tab, tap *Inventory*.

   The list of items is displayed sorted alphabetically by item code. By default, the first 20 items appear. To view the next 20 items, scroll down the list to the bottom. To refresh the list, pull down the list at the top of the list.

   > **Note**
   >
   > Users of SAP Business One, version for SAP HANA who has Android tablets can view in the *Pervasive* tab the pervasive analysis information for the item. For more information, see *Pervasive Analysis* section in the *SAP Business One, version of SAP HANA User Guide*.

2. To view information about an item, tap the item.

   The Item Info page displays detailed information about the item, including user-defined fields.

   - To view the price of the item in various price lists, tap *Unit Price*.
   - To view inventory levels of the item by warehouse, tap *In Stock Qty*. For each warehouse, you see the quantity of the item in stock, committed, ordered, and available.

5.10 Viewing Price Lists in the Price Lists Module

In the *Price Lists* module, you can view the price lists as defined in your SAP Business One company database and search for specific items within a given price list.

5.10.1 Viewing Price List Details in the Price Lists Module

Procedure

1. On the *Modules* tab, tap *Price Lists*.

   The *Price Lists* page appears, listing all the price lists that exist in your SAP Business One company database.
2. To view the prices defined in a specific price list, tap the relevant price list.

   The `<price list name>` page appears. The selected shows a list of items sorted alphabetically by item code with their prices. By default, the first 20 items appear. To view the next 20 items, scroll down the list to the bottom. To refresh the list, pull down the list at the top of the list.
3. To return to the *Price Lists* page, tap *Back*.

5.10.2 Searching for Items Within a Price List

To search for a specific item within a given price list, follow the steps described in Searching in the Mobile App [page 22].

5.11 Managing Sales Documents in SAP Business One Mobile App

You can view, search for, create, and cancel sales quotations, and sales orders, as well as submitting drafts of sales quotations and sales orders for approval, by using the relevant module:

- *Sales Quotations* module
- *Sales Orders* module

In addition, you can update exiting sales quotations and sales orders, manage activities related to these documents, create sales orders based on sales quotations, and view deliveries.

5.11.1 Viewing Sales Document Information

Procedure

1. On the *Modules* tab, tap the relevant module.

   A page listing the existing sales documents of the selected module appears. The sales documents are sorted in descending order by document number. By default, the 20 most recent documents are displayed. To view the next 20 documents, scroll down the list to the bottom. To refresh the list, pull down the list at the top of the list.

   > ⓘ Note
   >
   > Sales documents with a status of *Open* have a blue side bar in the front of the sales document.

2. To view information about a sales document in the list, tap the sales document.
   - For sales opportunities, the *Opportunity Info* page displays opportunity details such as business partner, status, stage, and so on.
   - The Info page for sales order and sales quotation contains four tabs: *Header*, *Contents*, *Logistics*, and *Accounting*. The page contains the following information:
     - *Header* tab – Document number, currency, sales employee, customer reference number, status, business partner details, dates, total values, and user-defined fields, if any exist
     - *Contents* tab
       For an item type document:
       Each row has a summary row on this tab, including item description, item code, quantity, unit of measure, items per unit, and user-defined fields if exist. To view row details, tap the row. The *Details* page appears.
       To view detailed information of the item, tap *Item*. The *Stock Info* page appears.
       For a service type document:
       Each row in the sales order has a summary row on this tab, including description, line total, and user-defined fields if exist. Line total is displayed in document currency. To view row details, tap the row. The *Details* page appears.
     - *Logistics* tab – Bill-to and ship-to addresses and shipping type, if defined. To see a map and get directions, tap the relevant address.
     - *Accounting* tab – Payment terms and payment means defined for the document, as well as the BP project.

5.11.2 Updating Sales Documents

Context

You can update existing sales quotations and sales orders that comply with the following conditions:

- The sales quotation or sales order is in status *Open*
- The sales quotation or sales order was not fully or partially drawn into target document
- The sales quotations or sales order is not subject to approval procedure

Procedure

1. Display the sales quotation or sales order you need to update.
2. Tap and choose *Edit Quotation (or Order)*.

   The document is switched to the *Edit* mode.
3. Make all the changes required.

   > **Note**
   >
   > When editing an existing item, you can check the available quantity of the item as follows:
   >
   > 1. Tap in the item details page to expand the pop-up menu and tap *Inventory by Warehouse*.
   > 2. The *Inventory by Warehouse* page appears, displaying the total available, in-stock, ordered, and committed quantities in all warehouses, as well as in each warehouse separately.
   > 3. To return to the *Items* page, tap .
4. To save your changes, tap .

   > **Note**
   >
   > The following values cannot be modified:
   >
   > - Customer code and customer name
   > - Document currency

5.11.3 Cancelling Sales Documents

Context

You can cancel existing sales quotations and sales orders that comply with the following conditions:

- The sales quotation or sales order is in status *Open*

- The sales quotation or sales order was not fully or partially drawn into target document
- The sales quotations or sales order is not subject to approval procedure

Procedure

1. Display the sales quotation or sales order you want to cancel.
2. Tap .
3. Choose *Cancel Quotation* or *Cancel Order* (depends on the selected document)
4. A warning saying that the action is irreversible appears. To complete the cancellation, tap *OK*. The status of the document is set to *Canceled*.

5.11.4 Copying Sales Quotations to Sales Orders

Context

You can further process sales quotations on the mobile app and copy them to sales orders. To do so, follow the steps below:

Procedure

1. Display the sales quotation you want to copy into a sales order.
2. Tap .
3. Tap *Copy to Order*. The *Add Sales Order* page appears, displaying all the information taken from the selected sales quotation.
4. To add the sales order based on the sales quotation, tap .
5. The sales order is saved and the status of the sales quotation which serves as the base document is set to *Closed*.

5.11.5 Searching for Sales Documents

To search for specific sales document, follow the steps described inSearching in the Mobile App [page 22].

5.11.6 Filtering Sales Quotations, Sales Orders, and Deliveries

You can filter sales quotations, sales orders, and deliveries to view only documents with status *Open*, documents created by you, or to view all the existing documents.

To filter the view of existing documents, choose the *Sales Quotations*, *Sales Orders*, or *Deliveries* module. A list of the respective documents appears.

- To view only documents in status *Open*, swipe the screen to the *Open* column.
- To view only documents created and owned by you, swipe to the *My* column.
- To clear the filter and display all documents, swipe to the *All* column.

> **Note**
>
> The *My* option is available only if the current user, who is logged on to the app, has an employee master data record that is linked to the current user code.
>
> When initiating a search after applying a filter, the search applies to the filtered list, and not to all existing documents.

5.11.7 Creating Sales Quotations and Sales Orders

Context

You can create sales quotations and sales orders only for items, not for services.

Procedure

1. On the *Modules* tab, tap the module of the sales document you want to create.

   The list of existing sales quotations or sales orders appears.

2. Tap .

   The *Add Sales Order* or *Add Sales Quotation* page appears.

3. To specify the business partner for whom the document is created, tap *Business Partner*.

   The list of business partners appears.

4. Select the relevant business partner and tap *OK*.
   - The field *Doc. Series* displays the default numbering series defined for the sales quotation or sales order. To assign to the document different numbering series, tap this field. A list of all available numbering series appears. Tap the numbering series you want to assign to this document.
   - The main contact person and the default sales employee of the selected business partner are automatically populated in the respective fields. To assign a different contact person or sales employee

to the document, tap the relevant field. A list of the available contact persons or sales employees appears. Tap the required contact person or sales employee and then tap *OK*.

- The BP currency is automatically populated in the *Currency* field. In case there is more than one currency defined for the BP, the first one is populated by default. To assign to the document a different currency, tap the *Currency* field. The list of available currencies appears. Tap the required currency and then tap *OK*.

5. To add items to the document, tap *Item*.

   The *Inventory* page appears listing the existing items.

6. Tap *Choose Item*, select the required items (you can select multiple items from the list), tap ✓ and specify the required quantity for each item. Tap ✓ to save your changes.

   To check the available quantity of the item in the warehouse, in the item details page, tap ⋮ in the upper right corner to show the pop-up menu and tap *Inventory by Warehouse*. The *Inventory by Warehouse* page appears, displaying the total available, in-stock, ordered, and committed quantities in all warehouses, as well as in each warehouse separately. To return to the Items page, tap *Back*.

   > ⓘ Note
   >
   > To remove an item, long tap on that item to activate the *Delete* menu.

   > ⓘ Note
   >
   > (For sales quotations only) You can mark selected items as alternative. The price of alternative items is not included in the document total. To mark an item as alternative, tap the relevant item and turn on the *Alternative* switch (under the *Item Name* field).

7. Specify any other relevant information.
8. Tap ✓ to add the document.

5.11.8 Submitting Drafts of Sales Quotations and Sales Orders for Approval

Context

You can create drafts of sales quotations and sales orders and trigger an approval procedure, if defined.

> ⓘ Note
>
> This functionality is available only if the checkbox *Activate Approval Procedures in DI* is selected in ▶ *Administration* ▶ *System Initialization* ▶ *General Settings* ▶ *BP* ▶ tab.

Procedure

1. Create and save a sales quotation or sale order as described in Creating Sales Quotations and Sales Orders [page 36].
2. A system message appears, notifying you that an approval is required.
3. Enter any relevant remarks and tap . To return to the document, tap *Cancel*.
4. A draft of the sales quotation or sales order is created and sent for approval.

5.11.9 Managing Activities for Sales Documents

You can view, add, edit, and close activities related to sales quotations and sales orders.

Related Information

Managing Activities in the Activities Module [page 24]

5.11.9.1 Viewing Activities Related to Sales Documents

Procedure

1. Display the relevant sales quotation or sales order and choose the *Header* tab.
2. Tap *Activities*.
3. A list of all the activities created for the displayed document appears. Closed activities appear in gray. Tap an activity to view its details.

5.11.9.2 Adding New Activities to Sales Documents

Context

To add new activity to an existing sales quotation, or sales order follow the steps below:

Procedure

1. Display the sales quotation or sales order to which you need to add the new activity.
2. Choose the *Header* tab, and then tap *Activities*.
3. The list of activities related to the selected document appears. Tap .
4. The *Add Activity* page appears, containing the details of the customer for which the document is created. Add the activity details and save the activity.

Related Information

Adding New Activities [page 25]

5.11.9.3 Editing Activities Related to Sales Documents

You can edit activities related to a specific sales quotation or sales order as long as the status of the activity is *Open*.

Procedure

1. Display the list of activities related to the relevant sales quotation or sales order (see Viewing Activities Related to Sales Documents [page 38]).
2. Display the activity you need to update and edit.
3. Make all required changes and save the changes.

> **Note**
>
> At this stage you cannot make any modification in the sales quotation or sales order to which the activity is related.

Related Information

Viewing and Processing Existing Activities [page 24]

5.11.9.4 Closing Activities Related to Sales Documents

Context

To close activities related to a specific sales quotation, or sales order perform the following steps:

Procedure

1. Display the list of activities related to the relevant document (see Viewing Activities Related to Sales Documents [page 38]).
2. Tap the activity you want to close. The *Activity Details* page appears.
3. Tap .
4. Tap *Close Activity*. A confirmation message appears. To close the activity, approve the message.

5.12 Managing Sales Opportunities

In the *Sales Opportunities* module you can:

- View, edit, create, and search for sales opportunities
- View, edit, and create stages for sales opportunities
- Assign sales employees to sales opportunities and sales stages and create new ones if required

5.12.1 Viewing Sales Opportunities

Procedure

1. On the *Modules* tab, tap *Sales Opportunities*.

   A page listing the existing sales opportunities, filtered by status appears. The sales opportunities are sorted in descending order by document number. By default, the 20 most recent sales opportunities of the selected status are displayed. To view the next 20 sales opportunities, scroll down the list to the bottom. To refresh the list, pull down from the top of the list.

> **Note**
>
> By default, sale opportunities with status *Open* are displayed. To display sales opportunities of status *Won* or *Lost*, swipe to the corresponding tab. To display all the sales opportunities, swipe to *All*.
>
> When initiating a search, the search applies to the filtered list only, and not to all of the existing sales opportunities.
>
> Sales opportunities in *Open* status have blue side bars in front of their sales documents.

2. Tap a sales opportunity to view its details.

   The *Opportunity Info* page displays opportunity details such as business partner, status, stage, and so on.

5.12.2 Editing Sales Opportunities

Context

You can edit the header information of a sales opportunity with status *Open* or you can edit its last stage. To do so, follow the steps below:

Procedure

1. On the *Modules* tab, tap *Sales Opportunities*. The list of existing sales opportunities appears.
2. Tap the sales opportunity you want to edit. The *Opportunity Info* page appears, displaying the details of the selected sales opportunity.
3. Tap and choose *Edit*. Make necessary changes.

   To edit the last stage of the selected sales opportunity, tap the *Stage* field, make necessary changes and tap .
4. Tap .

5.12.3 Creating Sales Opportunities

Procedure

1. On the Modules tab, tap *Sales Opportunities*.

   The list of existing sales opportunities appears.
2. Tap .

   The *Add Opportunities* page appears.

3. Specify the required information and tap .

5.12.4 Searching for Sales Opportunities

To search for specific sales opportunity, follow the steps described in Searching in the Mobile App [page 22].

5.12.5 Viewing Stages Related to Sales Opportunities

Context

To view stages related to a selected sales opportunity, perform the following steps:

Procedure

1. Display the sales opportunity.
2. Tap *All Stages*. The list of all stages and the respected closing rate related to this sales opportunity appears.
3. Tap a stage to view its details. The *Stage Info* page appears, displaying all the details of the selected stage:
   - *Closing Rate*
   - *Potential Amount*
   - *Stage* - displays the stage name
   - *Stage Start Date* and *Stage Close Date*
   - *Sales Employee*
   - *Remarks*
   - *Document* - if the stage is related to a specific sales document (sales quotation or sales order), this field displays the document type and its number. To view the related document, tap the field.
   - *Activities* - tap to view the list of activities related to this stage. You can also add or update the activities in latest stage.

5.12.6 Adding New Stages to Sales Opportunities

Context

You can create new stages to existing sales opportunities with status *Open*.

To create new stages for sales opportunities, perform the following steps:

Procedure

1. Display the sales opportunity for which you want to create the new stage, and tap .
2. Tap *Add a Stage*. In the *Add a Stage* page enter all relevant details for the new stage. *Potential Amount* is a mandatory field.
3. To relate the new stage to a specific document type, tap *Doc. Type*, and select either sales quotation or sales order. Then, choose the specific sales quotation or sales order. The selected document and its number are displayed in the *Document* field, in the *Stage Info* page.
4. Tap .

5.12.7 Setting Status of an Open Sales Opportunity to Won or Lost

Context

To set the status of an *Open* sales opportunity to *Won* or *Lost*, perform the steps below:

Procedure

1. Display the sales opportunity for which you want to change the status. Tap .
2. Tap *Set Status*. Tap the status you want to set to for the sales opportunity.

> **Note**
>
> When changing the status of a sales opportunity from *Open* to either *Won* or *Lost*, it is not possible to make any additional changes to the document.

5.13 Viewing Service Contracts and Searching for Equipment Cards in the Service Contract Module

In the *Service Contract* module, you can:

- View details of service contracts and search for service contracts.
- Search for and view customer equipment cards by entering an item's serial number for a keyword search.

5.13.1 Viewing Service Contracts

Procedure

1. On the *Modules* tab, tap *Service Contracts*.

   The *Service Contract* page appears. It displays a list of service contracts, sorted in descending order by the end date of the contract. By default, 20 service contracts with an end date furthest in the future are displayed.

   To view the next 20, scroll down the list to the bottom. To refresh the list, pull down at the top of the list.

   > **Note**
   >
   > An end date in red indicates an expired contract.

2. To view the details of a contract, tap the contract.
3. In the *Contract Detail* page, you can do the following:
   - View information about the contract, such as service type and validity period. In addition, you can see cumulative response time and resolution time for service calls created for this contract and a list of the service calls for items covered by the contract.
   - Access the business partner by tapping either *BP Name* or *BP Code*.
4. To return to the list of service contracts, on the left of the toolbar, tap *Service Contract*.

5.13.2 Searching for and Viewing Customer Equipment Cards

Context

A service contract may include one or more customer equipment cards. You can search for the equipment card of an item by using the item's serial number or manufacturer's serial number (if the item's serial number is not available).

Procedure

1. On the *Modules* tab, tap *Service Contract*.

   The *Service Contract* page appears.

2. From either the *Service Contract* page or the *Contract Detail* page, tap . To search by the serial number, tap *Search Serial Number*, enter a serial number, and tap *OK*.
3. If a customer equipment card is found, the *Customer Equipment Card* page appears, displaying information about the equipment, such as status and start and end dates.

To view the service contract for this equipment item, tap *Service Contract* at the bottom of the *Contract Detail* page. To view service calls created for this customer equipment card, tap *Service Call*.

5.14 Viewing and Processing Service Calls in the Service Calls Module

In the Service Call module, you can:

- View service calls and service call details, including activities and solutions created for the service call
- Pick up service calls
- Close service calls
- Create new activities and solutions for service calls

5.14.1 Viewing Service Call Details

Procedure

1. In the *Modules* tab, tap *Service Call*.

   The *Service Call* page appears. It displays a list of service calls, sorted in descending order by date. By default, the most recent 20 service calls with status Open are displayed. To view all of the existing service calls, tap *All*; To view only service calls with status *Pending*, tap *Pending*. To view only service calls assigned to you, tap *My*. For service calls with status *Open* or *Pending* the creation date is considered; for closed service calls, the *Closed On* date is considered.

   To view the next 20, scroll down the list to the bottom. To refresh the list, pull down at the top of the list.
2. To view the details of a service call, tap the call.

   In the *Service Call Info* page, you can view the following:
   - Business partner details
   - Relevant customer equipment card
   - Details about the item for which the call was created
   - Call status and priority
   - Activities created and assigned to the service call
     1. To view the activities created for the service call, tap *Activities*.
     2. On the *Activities List* page, tap an activity to view its details.
   - Solutions created and assigned to the service call
     1. To view solutions created and assigned to the service call, tap *Solutions*.
     2. On the *Solution* page, tap a solution to review its details.
3. To return to the list of service calls, tab *Back*.

5.14.2 Picking Up Service Calls

Context

You can pick up service calls with status *Open*. The status of the service call is then updated to *Pending* and the *Handled By* field is filled with the name of the current user. In addition, you can pick up service calls with status *Pending* that are handled by other users than the current user. In that case, the *Handled By* field is updated accordingly.

Procedure

1. In the *Modules* tab, tap *Service Call*.
2. The *Service Call* page appears with a list of service calls. For information about the list, see Step 1 in Viewing Service Call Details [page 45]. Service calls with status *Open* have blue side bars in the front of them.
3. Tap the service call you want to pick up.
4. On the *Service Call Info* page, tap and then tap *Pick Up*.

   A warning message appears asking you to confirm picking up the call.
5. To continue, tap *OK*.

   You can now process the service call: add new activities or solutions and close the service call.

5.14.3 Closing Service Calls

Procedure

1. In the *Modules* tab, tap *Service Call*.

   The *Service Call* page appears with a list of service calls. For information about the list, see Step 1 in Viewing Service Call Details [page 45]. Service calls with status *Open* have blue side bars in the front of them.
2. Tap the service call you want to close.
3. On the *Service Call Info* page, tap and then tap *Close Service Call*.

   A warning message appears asking you to confirm closing the call.
4. To close the call, tap *OK*.

   The status of the call is updated to *Closed* and the *Closed On* field is filled with the date on which you closed the call.

5.14.4 Adding New Activities and Solutions to Service Calls

Context

You can add new activities and new solutions only to service calls with status *Open* or *Pending*.

Procedure

1. Display the relevant service call.
   - To add an activity:
     1. Tap *Activities*.
     2. On the *Activities List* page, tap .
     3. On the *Add Activity* page, specify the activity details and tap *Save*.

     > **Note**
     >
     > If you create a *Meeting* activity, *Address* field is added enabling to enter the meeting location.
   - To add a solution:
     1. Tap *Solutions*.
     2. On the *Solutions List* page, tap .
     3. On the *Add Solution* page, fill in the solution details and then tap *Save*.
2. To return to *Service Call* page, tap *Back*.

5.15 Viewing Dashboards in the Dashboards Module

Using the *Dashboards* module, you can view a list of predefined dashboards.

> **Example**
>
> - *Sales Analysis* – contains the following charts:
>   - *Fiscal Year Analysis* – compares this year's sales amount to last year by month.
>   - *Opportunity Win Rate* – compares this year's opportunity win rate to last year by month.
>   For a displayed month, the win rate equals the number of opportunities won in the month divided by the total number of opportunities closed in the month.
>   Closed opportunities include opportunities with a status of *Won* or *Lost*.
>
>   > **Note**
>   >
>   > *Fiscal Year Analysis and Opportunity Win Rate* display general sales performance.
>   - *Top 5 Customers* – displays the top five customers selected by current fiscal year revenue.
>   To view details about a customer, tap *Sales Amt* or *Gross Profit* associated with the customer. The *Item Ranking and Opportunities Status* charts are updated for the selected customer.

- *Item Ranking* – displays the top five items for the selected customer in the current fiscal year.
- *Opportunities Status* – displays opportunities by status for the selected customer.

  > **Note**
  >
  > *Top 5 Customers*, *Item Ranking*, and *Opportunities Status* display details about the top five customers.

- *Cash Flow* – Contains the following charts:
  - *Cash Flow Forecast Overview* – displays incoming cash flow and outgoing cash flow by month. To view details of incoming cash flow or outgoing cash flow for a month, tap the corresponding period. The *Cash Flow Details* and *BP Amount* charts are updated accordingly.
  - *Cash Flow Details* – displays the five transactions with the largest amounts for the selected period sorted in descending order by amount.
  - *BP Amount* – displays cash flow amounts by business partner for the selected period.
- *Purchase Quotations*– contains the following charts:
  - *Purchase Quotation Overview* – displays the overview of purchase quotations in three categories (*Responded*, *Partial/No Response*, *Overdue*).
    To view the purchase quotation details, tap each section of the pie chart.
  - *Purchase Quotation Detail* – displays detailed information on purchase quotations according to the selected category.
    The default category is *Partial/No Response*.
- *Cash Flow Forecast* – available only when using SAP Business One mobile app 1.1.x for Android and higher on top of SAP Business One, version for SAP HANA, and on tablets only. This dashboard provides you detailed information about your company's incoming and outgoing cash flows. For more information, see the *Using Cash Flow* section in the *SAP Business One, Version for SAP HANA User Guide*.
- *User Defined Pervasive Dashboards* - available only when using SAP Business One mobile app 1.1.x for Android on top of SAP Business One 9.0, version for SAP HANA or higher. If you created pervasive dashboards by using the pervasive analysis designer, you can view them in the *Dashboards* module. These dashboards are listed after the predefined dashboards.

In addition, you can configure the refresh settings of the data cache for mobile dashboards.

5.15.1 Viewing a Selected Dashboard

Procedure

1. On the *Modules* tab, tap *Dashboards*.

   The *Dashboards* page appears.
2. Tap the dashboard that you want to view.

   The respective dashboard page appears, containing the relevant charts.
3. To maximize a chart, double-tap the chart. To return to the dashboard home page, double-tap the maximized chart.

4. To return to the SAP Business One mobile app home page, tap .

> **Note**
>
> You can rotate the device into landscape to have a better view.

5.15.2 Configuring the Data Cache

Context

You use the same data cache functionality in both SAP Business One, and mobile dashboards. To enable the data cache and specify a schedule for refreshing data in dashboards, proceed as follows:

Procedure

1. Choose *Administration* > *Setup* > *General* > *Dashboard Manager*.
2. In the *Dashboard Manager* window, choose the *Refresh Settings* button.
3. In the *Data Refresh Settings* window, enable the data cache by selecting the *Enable Data Cache* checkbox.
4. To establish a new time schedule, or to change an existing schedule for refreshing data in dashboards, select one or more checkboxes for the desired times (listed in the *Refresh Data At* column).
5. To save your changes, choose the *Update* button.

5.16 Managing Reports in the Reports Module

In the *Reports* module, you can generate reports, save reports to Google Drive, share reports via Bluetooth and Android Beam, and download and print them.

> **Note**
>
> The availability of these functions may vary according to your Android version.

5.16.1 Generating Reports

Procedure

1. In the *Modules* tab, tap *Reports*.

The list of available reports appears.

2. Tap the report that you want to generate.
3. If the report requires entering selection criteria, the *Selection Criteria* page appears. Tap a parameter to specify the required value. Then tap *OK* to return to the *Selection Criteria* page. Repeat this step until all selection criteria parameters are specified.
4. The chart and detailed information in the report appear. You can zoom in and out by either pinching or double-tapping. To change the orientation between portrait and landscape, rotate your device.
5. To return to the list of reports, tap *Reports*

5.16.2 Saving, Sharing and Printing Reports

Prerequisites

The availability of the following functions may vary depending on your device, operating system, and applications.

Procedure

1. In the *Modules* tab, tap *Reports*.

   A list of available reports is displayed.
2. Tap the report that you want to save, share or print, and proceed as follows.

   - To save the report to Google Drive, tap , or tap and choose *Send file...* > *Save to Drive*.
   - To share the report by Gmail, Bluetooth or Android Beam, tap and choose *Send file...*.
   - To download the report, tap and choose *Download*.
   - To print the report, tap , choose*Print* and then follow the system instructions.

5.17 Managing Attachments

You can view, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls.

The Attachments entry is added as follows:

- To the *General* tab in the *BP Info* and *Item Info* pages
- To the *Activity Details* in *Activity*
- To the *Opportunity Info* in *Sales Opportunity*
- To the *Header* tab in sales documents

- To the *Service Call Info* in *Service Call*

5.17.1 Viewing Attachments

Procedure

1. Open the relevant document or object and navigate to the *Attachments* entry. Tap *Attachments*.
2. The *Attachments* page appears, listing the attached files. Touch and hold the attachment file you want to view.
3. Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears.
4. Select the required program. The selected attachment file is displayed.

5.17.2 Uploading Attachments

Prerequisites

Before adding an attachment, please ensure that it is virus-free.

Context

You can upload attachments of image file types only, by either browsing to the required image file, or by taking a picture using your mobile device.

Uploading attachment is only possible to documents and objects that can be updated.

Procedure

1. Open the document or object to which you want to add an attachment. Tap *Attachments*.
2. The Attachments page appears. To choose an existing image file, tap *Choose Photo* and browse to the image file you want to attach. To take a picture and attach it, tap *Take Photo*.

6 Appendix

More Information

Further information can be found in the following two SAP Notes:

- 1618978 - B1ic_Troubleshooting Guide for B1ic Installation
- 1924930 - SAP Business One mobile app for Android - Troubleshooting and compatibility information

6.1 Function-Level Authorizations for Users to Work with the App

The Modules tab of the mobile app displays the twelve modules provided by SAP, as well as user defined modules if exist. For SAP-provided modules, the mobile app retrieves authorization settings as defined in SAP Business One desktop application, controlling accessing, viewing, adding, and editing data.

The *Alert* and *Approval* modules do not require function-level authorization and are accessible by all users that are enabled to work on a mobile device.

In SAP Business One, a super user can assign permissions to a user by choosing *Administration* > *System Initialization* > *Authorizations* > *General Authorizations*.

The following table shows the functions that users can perform, and what authorizations are needed.

Action	Minimum Required Authorization	Permission Setup in SAP Business One
View SAP Crystal Reports	Full Authorization	A user needs authorization in SAP Business One to view each report. If a user does not have authorization to view a report in SAP Business One, the user cannot view the report using the mobile app.
Add customer or vendor	Full Authorization	*Adding Customer/Vendor Master Data* section in *Authorizations* window
Add lead	Full Authorization	*Adding Lead BP* section in *Authorizations* window

Action	Minimum Required Authorization	Permission Setup in SAP Business One
View Leads	Full Authorization	*Business Partner Type* > *Leads in the Business Partners* section in the *Authorizations* window
View Customers	Full Authorization	*Business Partner Type* > *Customers* in the *Business Partners* section in the *Authorizations* window
View vendors	Full Authorization	*Business Partner Type* > *Vendors* in the *Business Partners* section in the *Authorizations* window
View account balance and credit limit in the *BP Info* page	Read Only	*BP Balances* in the *General* section in the *Authorizations* window
Add activity	Full Authorization	*Activity* section in *Authorizations* window
Edit activity	Full Authorization	*Activity* section in *Authorizations* window
View activity	Read Only	*Activity* section in *Authorizations* window
View item	Read Only	*Item Master Data* section in *Authorizations* window
View price list	Read Only	*Price Lists Group #* section in *Authorizations* window
View special price list	Read Only	*Special Prices for Business Partners* section in *Authorizations* window
View sales opportunity	Read Only	*Sales Opportunities* section in *Authorizations* window
Add/Update sales opportunity	Full Authorization	*Sales Opportunities* section in *Authorizations* window
View sales order	Read Only	*Sales Order* section in *Authorizations* window
Add/Update sales order	Full Authorization	*Sales Order* section in *Authorizations* window
View sales quotation	Read Only	*Sales Quotation* section in *Authorizations* window

Action	Minimum Required Authorization	Permission Setup in SAP Business One
Add/Update sales quotation	Full Authorization	*Sales Quotation* section in *Authorizations* window
Update sales employee in sales quotation or sales order	Full Authorization	*Change Sales Employee* and *Sales Employee Update* in *Sales - A/R* section in Authorizations window
View dashboard	Full Authorization	*Dashboard* section in *Authorizations* window
View service contract	Read Only	*Service Contract* section in *Authorizations* window
View customer equipment card	Read Only	*Customer Equipment Card* section in *Authorizations* window
View service calls	Read Only	*Service* Section in *Authorizations* window
Process service calls	Full Authorization	*Change Status in Special Service Call Authorizations* section in *Authorizations* window

The permission related to a price list has nothing to do with the permission related to price list groups. If a user has no authorization for a price list, SAP Business One does not display any price list. If a user has no authorization to a specific price list group, SAP Business One does not display any price lists that belong to this group.

> ⓘ Note
>
> The price lists that belong to the price list group for which the user has either full authorization or read-only authorization are displayed in the mobile app.
>
> In the KPI view, queries that belong to the saved queries group for which the user has either full authorization or read-only authorization are displayed.

6.2 Mobile App Function Availability Based on SAP Business One License Type

The functions available for each user on the mobile app are derived from the type of license assigned to the user and from the authorizations granted to the users in SAP Business One desktop application.

Users who are granted with full authorizations within the license type assigned to them can use all the mobile app functions described in this document with the following exceptions:

- Limited Logistics License – cannot access Sales Opportunity, Service Call, and Service Contract Modules, and cannot add new Sales Quotations.
- Limited Financials License – cannot access Sales Opportunity, Service Call, and Service Contract Modules, and cannot add new Sales Orders and Sales Quotations.
- B1 Starter Package License – cannot access Service Call and Service Contract Modules.
- CRM Services License – cannot add new Sales Orders.

6.3 Localization Specific Information

- Brazil - In companies who activated the multi-branch functionality the *Branch* field appears when viewing business partners and in sales orders and sales quotations.
- Chile - the *RUT* field is available in the business partner record
- Costa Rica, Guatemala, and Mexico - the *RFC* field is available in the business partner record
- India - the *P.A.N. No.* field is available in the business partner record
- Korea - the field *Business Place* is available in sales orders

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