



# **SAP Business One Service**

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

February, 2019

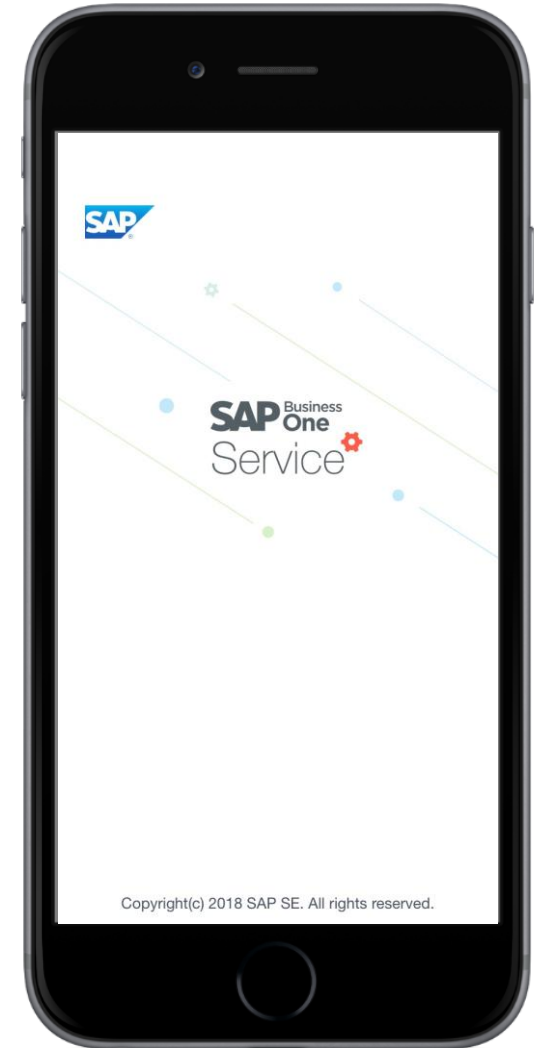
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# SAP Business One Service - Introduction

Provide on-site services for customers by easily and efficiently reviewing and resolving assigned service tickets.

SAP Business One Service enables you to perform the following over Wi-Fi or cellular networks:

- View and filter your service tickets and synchronize them to your calendar.
- Resolve your service tickets:
  - Edit, close, share and print service tickets.
  - Scan barcodes or QR codes to identify items as needed and update information.
  - User favorite options to check in and check out, call customers, take photos and view service history.
  - Take quick actions to manage sales orders that are links to a service call.
- View your Key Performance indicators



# SAP Business One Service - Technical Information

## Requirements for iOS

- SAP Business One 9.3 PL04, version for SAP HANA, or higher
- Apple iPhone 5 or newer, iOS 8.0 or higher
- Download from Apple App Store

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

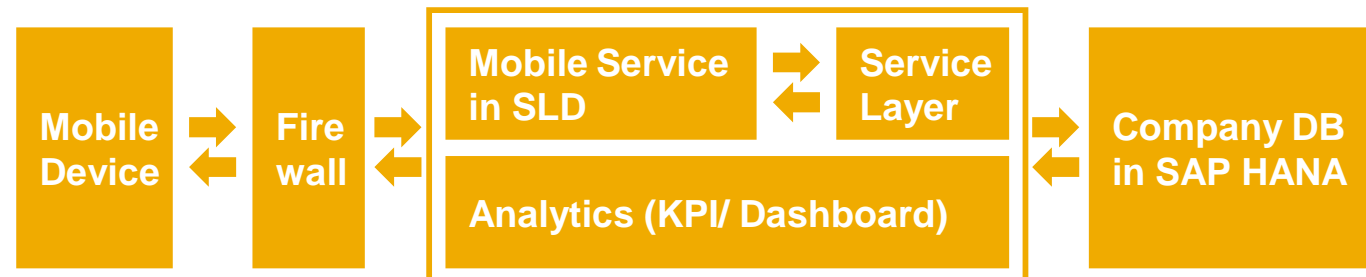
**License:** Professional, Limited CRM and Mobile Service users (new)

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

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

**Setup Prerequisites:** Ensure *Enable Multiple Scheduling for Service Calls* is activated in SAP Business One system. Refer to the How to Guide for important prerequisite details.

**Connection flow:**



## Requirements for Android

- SAP Business One 9.3 PL08, version for SAP HANA, or higher
- Android 5.1 and newer
- Download from Google Play Store

## Requirements for SAP Business One Cloud

- SAP Business One Cloud 1.1 PL09 or higher
- SAP Business One 9.3 PL04, version for SAP HANA, or higher
- Install the Mobile Service component in the Cloud Control Centre

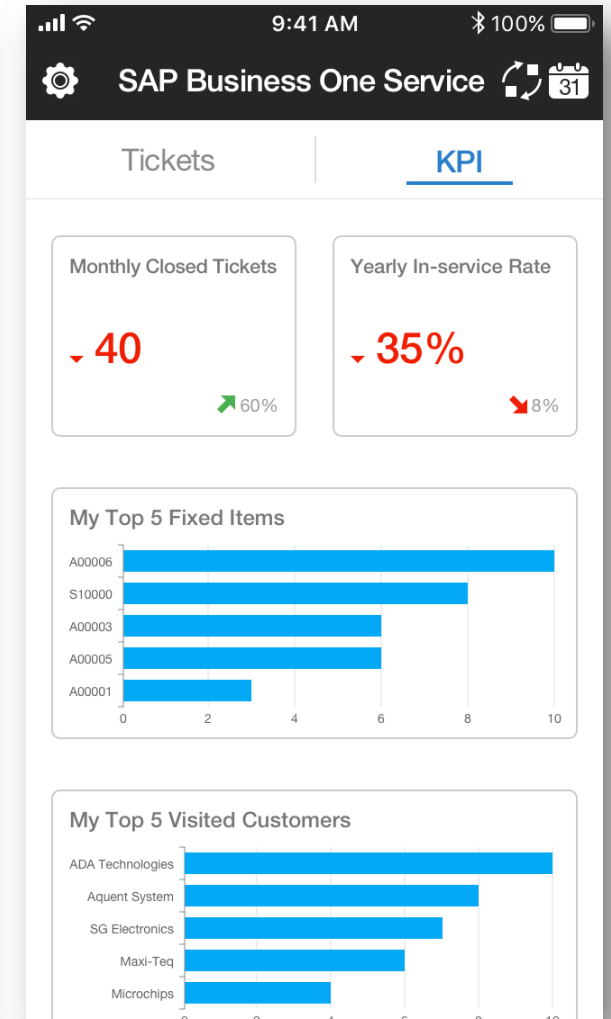
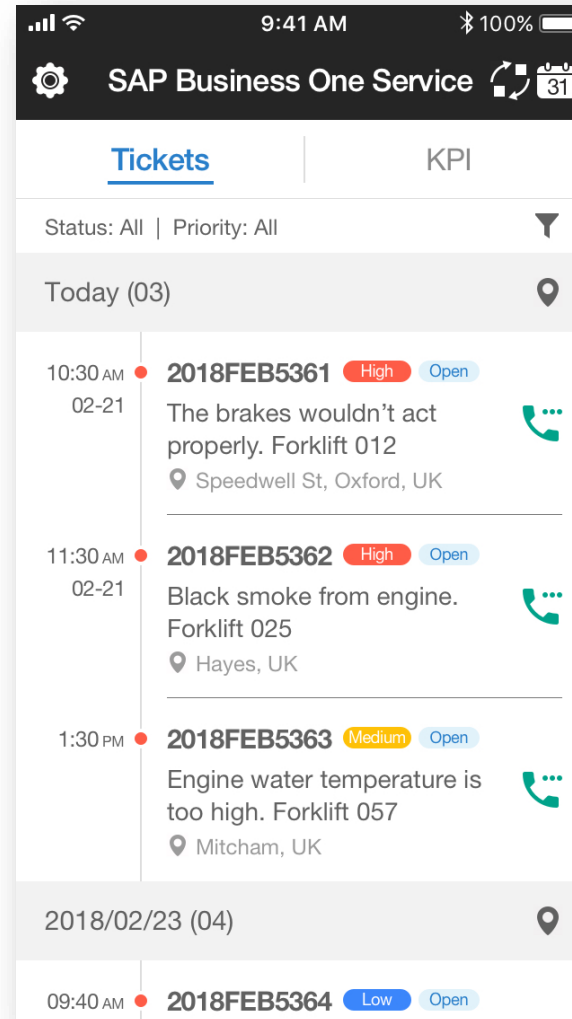
# SAP Business One Service - Getting Started

## Home Page:

- Overview of your service tickets.
- Call your customers.
- View customer locations on a map.
- Filter your service tickets.
- Check and synchronize your service tickets in your monthly calendar.
- Configure your personal settings.

## Key Performance Indicator (KPI) Screen:

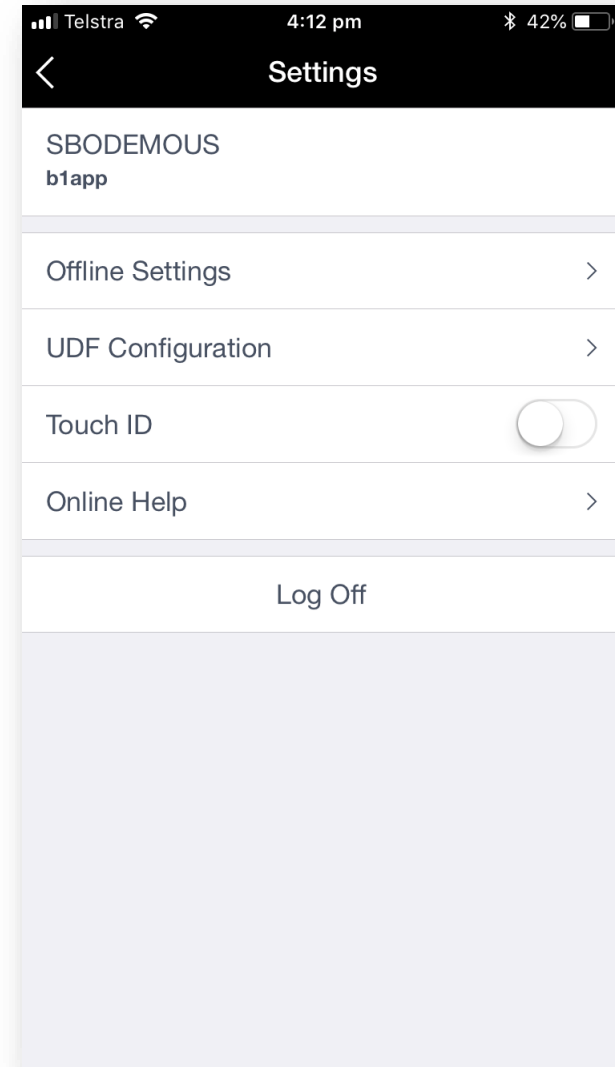
- Monthly closed tickets
- Yearly in-service rate
- Top 5 fixed items
- Top 5 visited customers
- Customize the KPI dashboard



# SAP Business One Service - Configuring Settings

## Features:

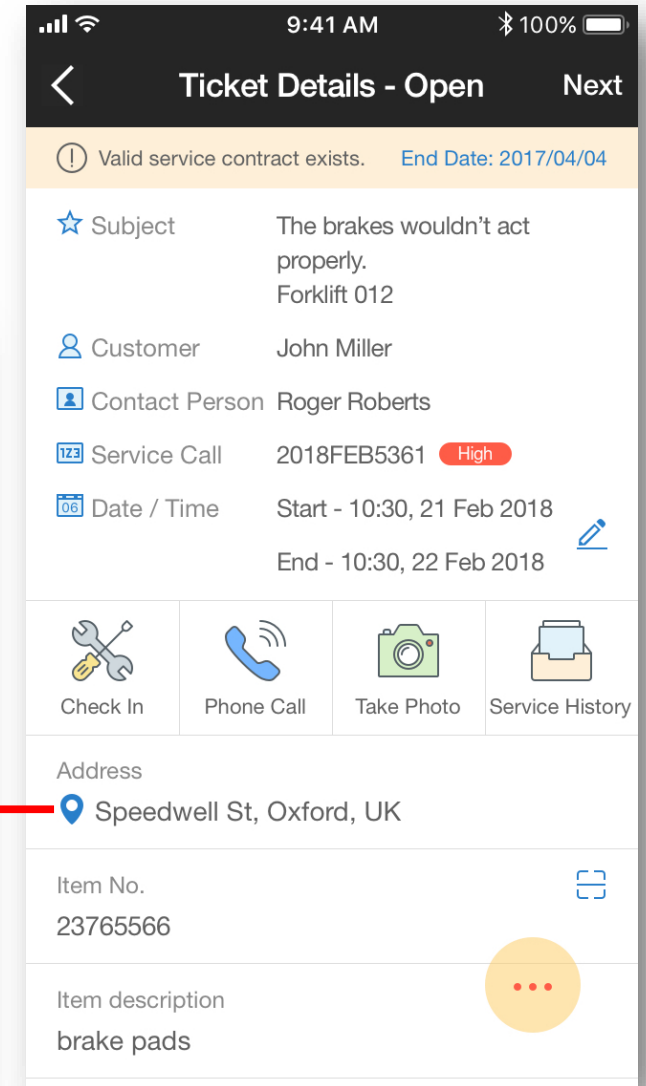
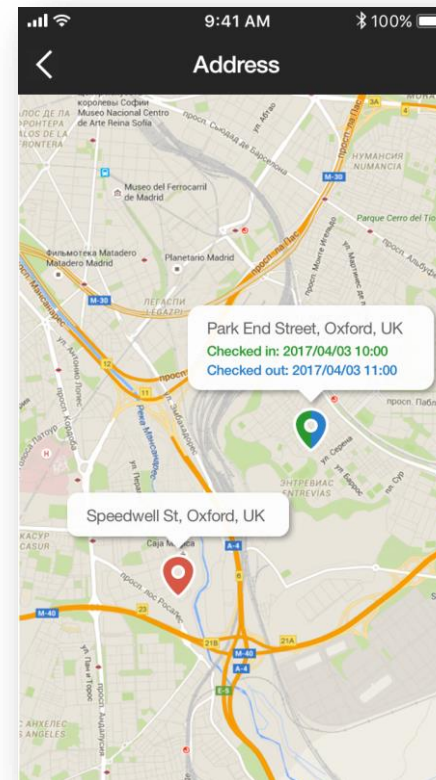
- Display your company name and user code.
- Offline settings enables you to download service ticket data and manage service tickets edited offline.
- Display or hide user-defined fields (UDFs).
- Touch ID/Face ID configuration available depending on your mobile device.
- Access online help.
- Log out activities.



# SAP Business One Service - Ticket Details

## Efficiently manage and resolve your service tickets online.

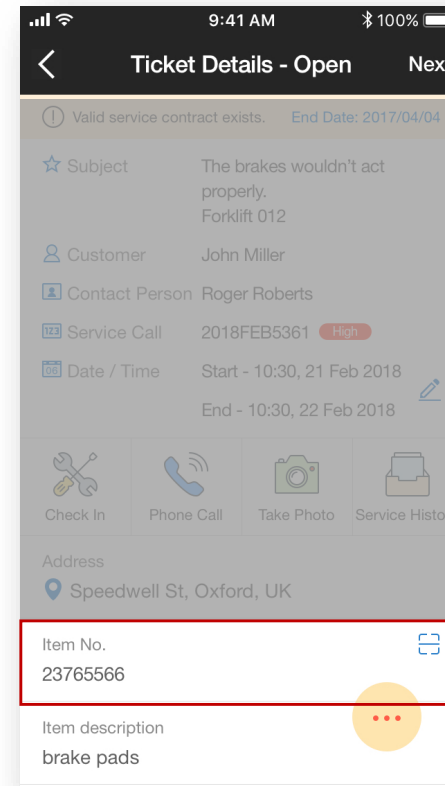
- View, edit, close, share and print your service tickets easily.
- The information banner on the top of the page shows the validity of the service contract for the item in the service ticket.
- Quickly review service contract details.
- Check address location on map.
- Access favorite options:
  - Check In
  - Phone Call
  - Take Photo
  - Service History



# SAP Business One Service - Identifying Items

**Easily identify an item by its Serial Number or Manufacturer Serial Number or the Item Code.**

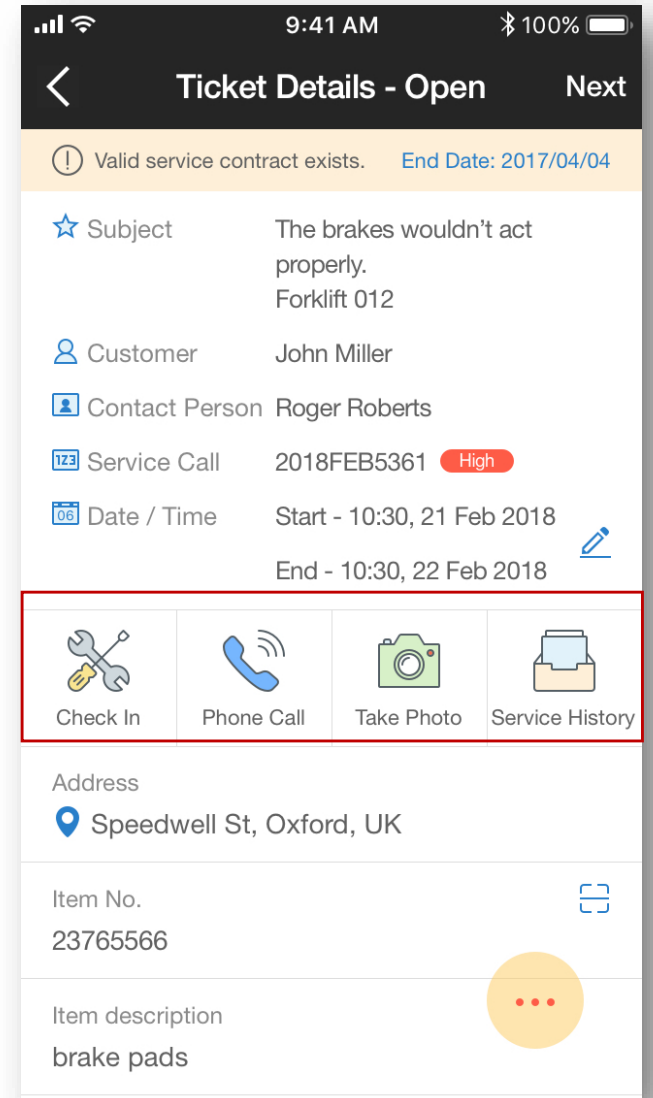
- Scan bar code or QR code to identify items for Serial Number or Manufacturer Serial Numbers and add/update the information.
- Option to turn on a flashlight when scanning.
- Set pricing mode for items as *Gross*, *Net* or *Mix Mode*.



# SAP Business One Service - Favorite Options

Use favorite options to easily access important information relating to your service ticket.

- *Check In (Out)* enables you to optionally check in and out in an open service ticket.
- *Phone Call* allows you to easily call your customer with a valid phone number.
- *Take Photo* enables you to capture important details or images for an open service ticket.
- *Service History* allows you to view a list of all other service call records that contain the item in the current service ticket.

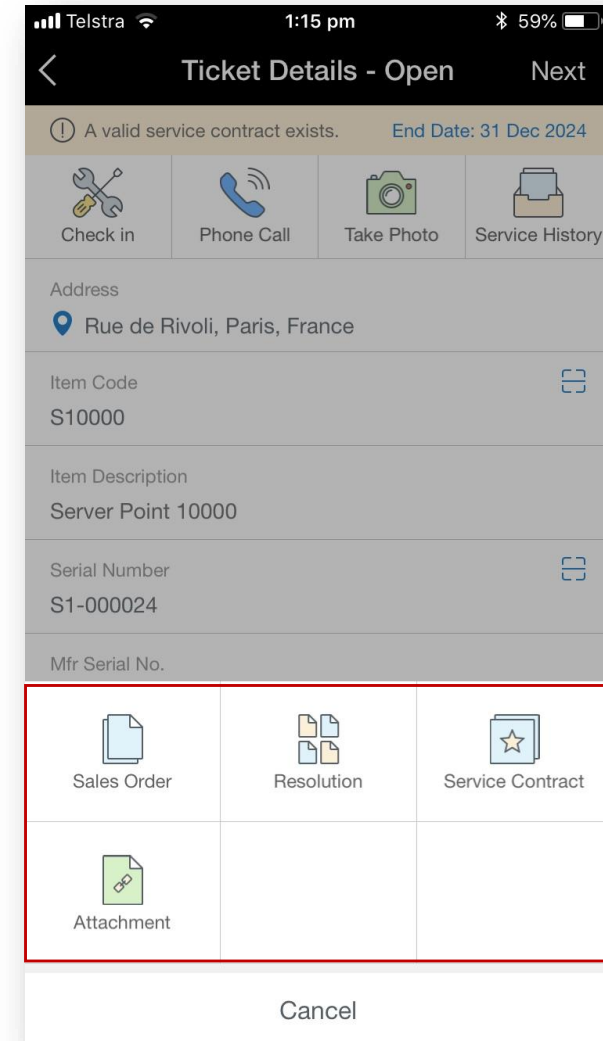




# SAP Business One Service - Quick Actions

**Take quick actions to efficiently manage the service call process.**

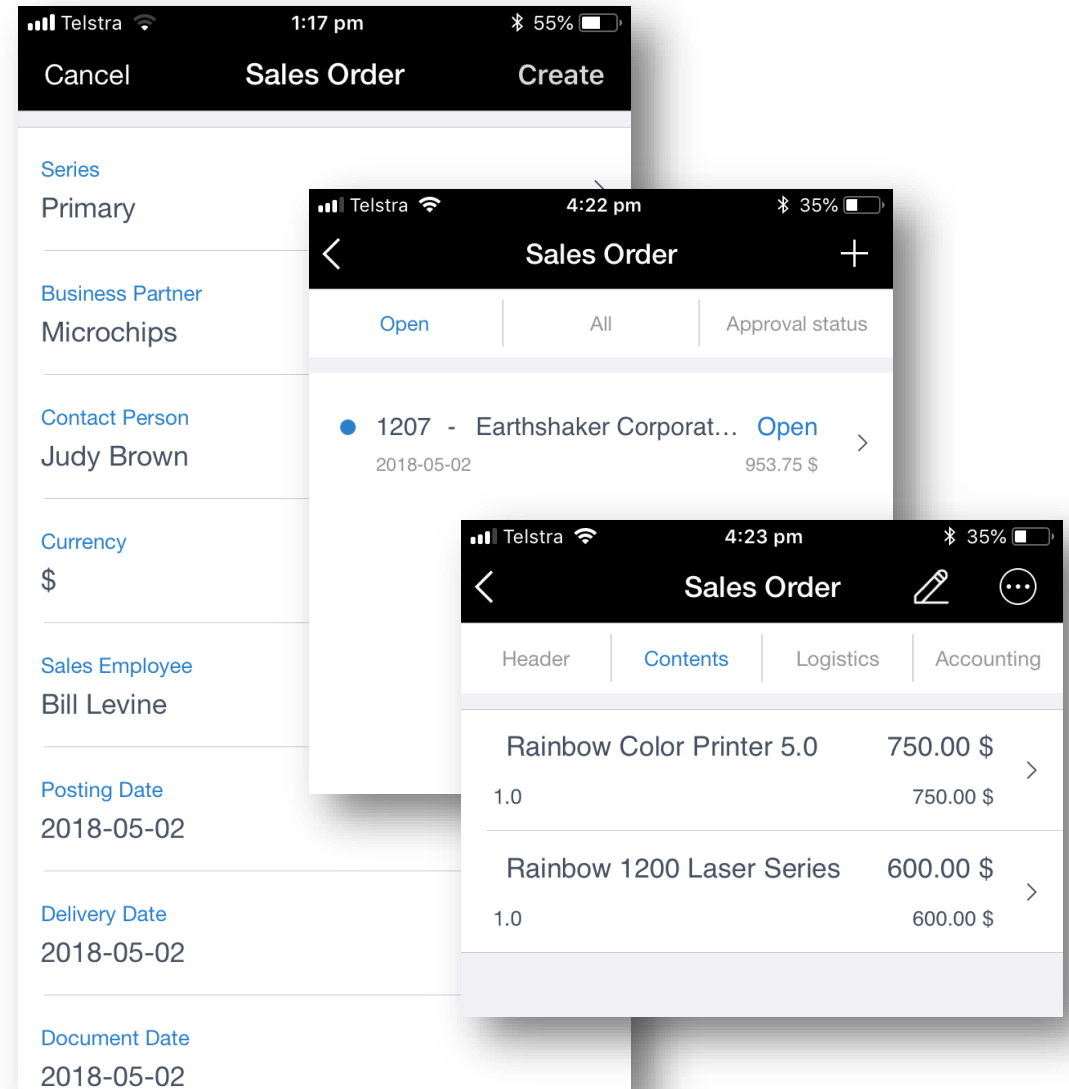
- Manage sales orders that are linked to a service call
- Add a resolution for a service ticket
- View the service contract for an item
- View attachments of and add photos to a service call



# SAP Business One Service - Manage Sales Orders

**Easily view, edit, create, duplicate and cancel sales orders that are linked to a service call that belongs to your service ticket.**

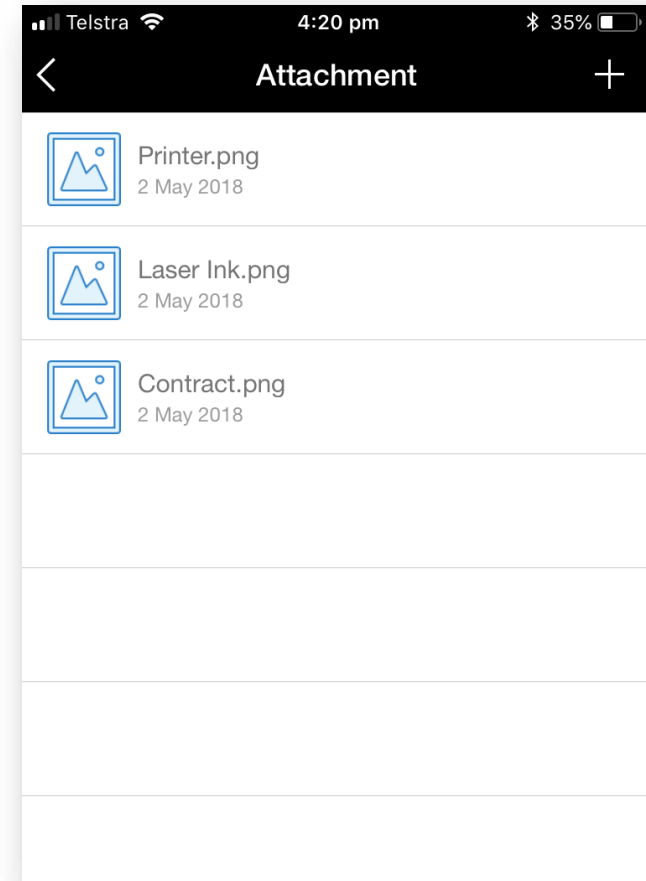
- Quickly view sales orders in the service call relating to the service ticket
- *Open* tab displays the list of open sales orders and the document number.
- *All* tab displays a list of all the sales orders that are linked to the service call relating to the service ticket.
- *Approval Status* tab enables you to check the approval progress of edited sales orders which are pending approval by the manager.
- Add approved sales orders to the relevant service calls.
- Flexibility to update sales orders during and after approval process.
- Easily tap into the sales order for more information such as items, financial and logistics information and payment details.



# SAP Business One Service - Attachments

**Attachments can include critical details of a service call relating to your service ticket.**

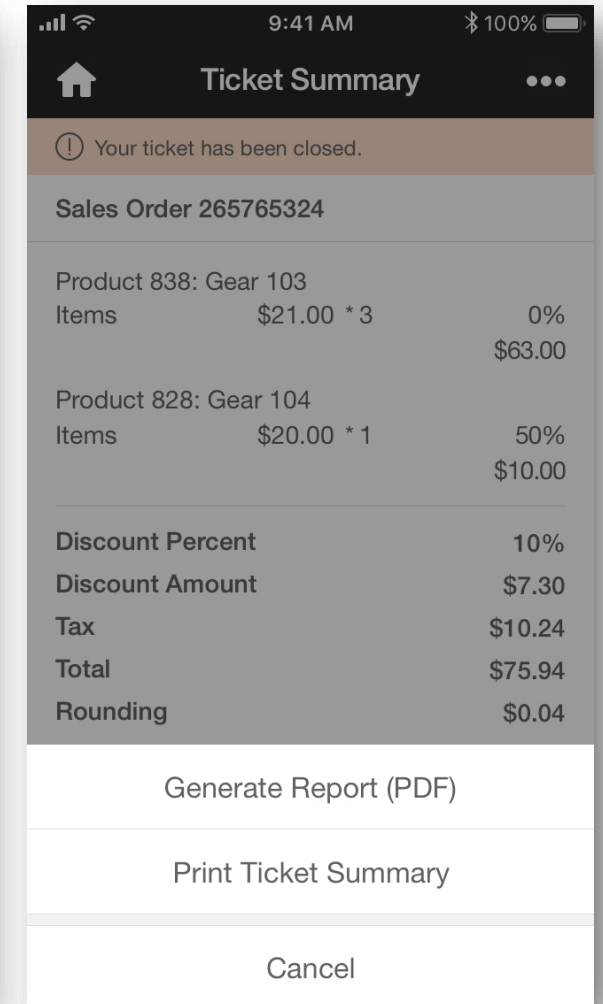
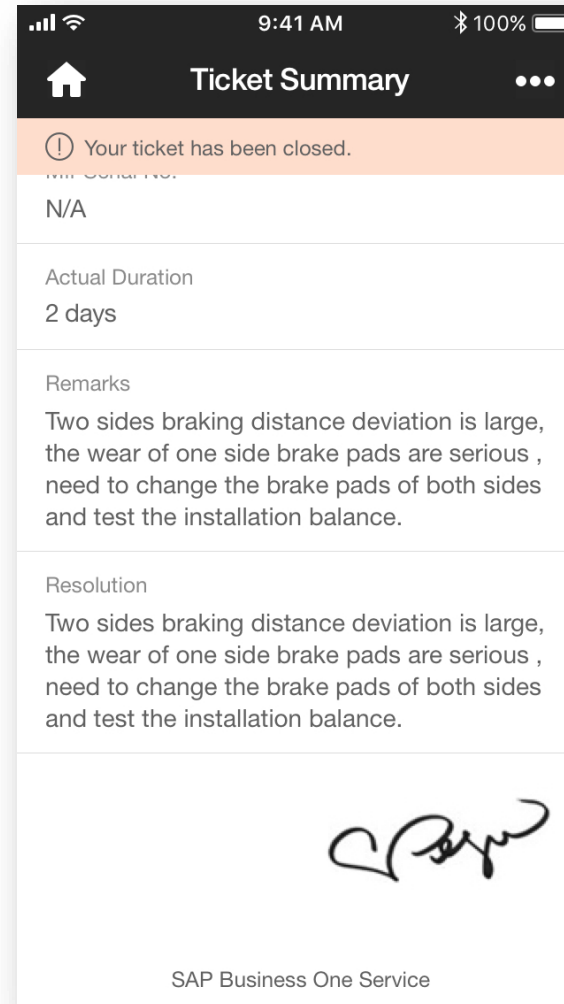
- View a list of all attachments that are linked to the service call which your current ticket belongs.
- Easily download and view an attachment.
- Add photos for an open service ticket.



# SAP Business One Service - Ticket Summary

The ticket summary allows you to review and capture a report for your service ticket.

- View and confirm the service ticket details.
- Easily capture a customer signature by signing on your phone screen and confirming the signature.
- Create a PDF to generate a formal report for the service ticket.
- Select a portable Bluetooth thermal printer to easily print the ticket summary.



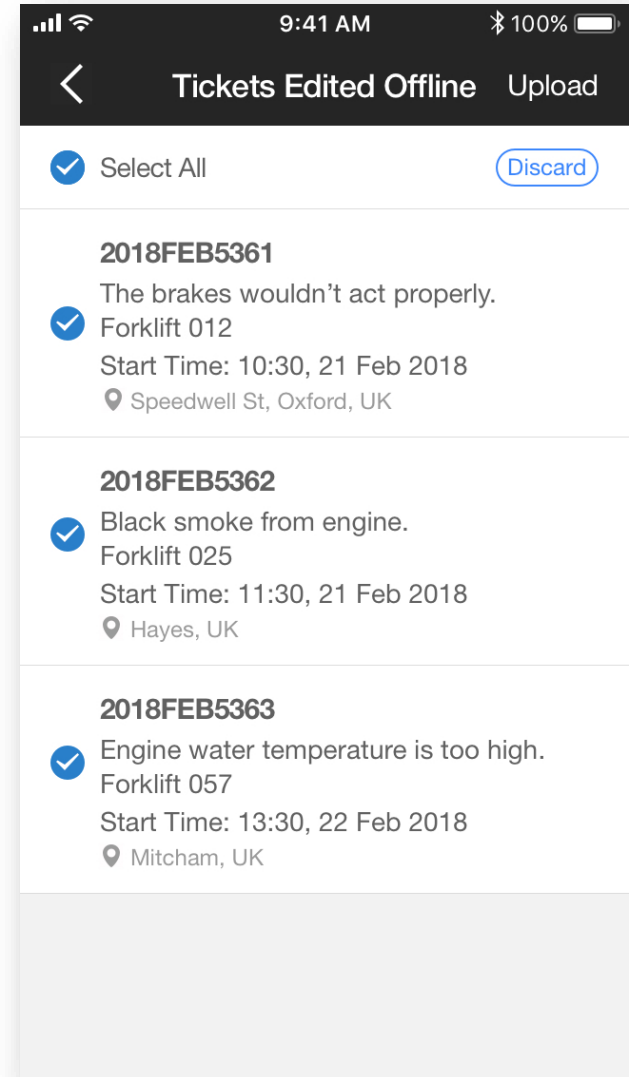
# SAP Business One Service - Working Offline

**No internet access? Simply download the latest service ticket data to your mobile device in advance.**

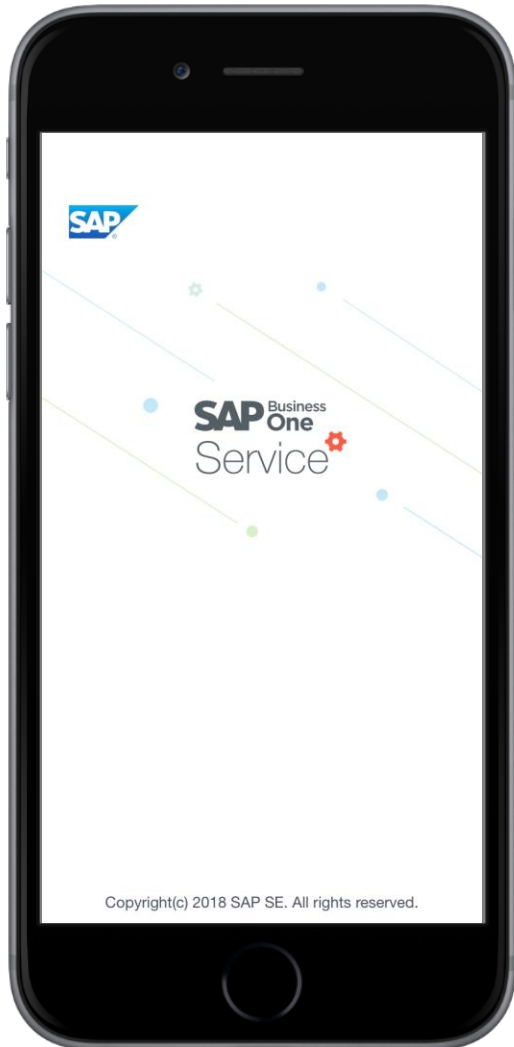
- Resolve downloaded service tickets offline
- Upload the edited service tickets when you are online again.
- Note that when you are offline, you will not be able to perform any action that requires internet connection.

**Manage personal data to conform with data privacy legislation.**

- Customer personal data can be cleared manually and is cleared automatically by SAP Business One Service in specific scenarios.
- Easily clear customer personal data contained in the changes that you make offline for a service ticket.
- Clear customer personal data contained in the downloaded or cached data.



# SAP Business One Service - Summary



1. Streamlined job management for **mobile technicians**
2. Using service layer and Fiori-style design
3. SAP HANA analytics elements
4. Easy setup, user-oriented, high usability
5. New, affordable license option
6. Comprehensive security

Detailed introduction and free trial:



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