

Mobile@Connector for SAP Business One from Logotec Engineering

General information

Overview

Mobile@Connector for SAP Business One provides mobile handheld access to SAP Business One data. You may work online or offline – full two-way synchronization is included.

The solution supports the standard SAP Business One functionality, and also the full range of customization specific for a given user (custom tables, form fields descriptions, etc.).

The solution is developed for Windows Mobile devices, including Pocket PC Phone Edition and Smartphones. It uses Logotec Engineering's award winning technology to harness the full potential of the devices to provide a robust, yet easy to use and affordable, mobile experience for SAP Business One users.

Supported devices

All Windows based devices are supported:

- Pocket PC (Windows Mobile 6.0/5.0, Pocket PC 2003 Second Edition)
- Pocket PC Phone Edition (Windows Mobile 6.0/5.0, Pocket PC 2003 Second Edition).
- Smartphones (Windows Mobile 6.0)

Important:

- the mobile application offers similar functionality as SAP Business One running at your notebook. There are, however, some limitations that are caused by the device's limited resources (screen size, memory, etc.). The application includes also the customization made by you in SAP Business One (custom tables etc.)
- ...but can also be additionally customized (additionally to the customizing offered in SAP Business One)

Price

The solution is offered as a hosted solution. The price is USD \$25 (Euro 25 in Europe) per user, per month, no other fees are requested. There is just a simple Month-to-Month plan, no long-term commitment expected.

If the possibilities offered by our solution would be not enough for you, ask for an "Extended account".

Acquiring the Mobile@Connector for SAP Business One account

Important

- *To use your trial or the full version you will have to enter following data:*
 - *SAP Business One DB user name*
 - *SAP Business One DB password*
 - *SAP Business One user name*
 - *SAP Business One user password*
 - *SAP Server address*
 - *SAP Business One adapter Url*

- We store your SAP Business One account name in our system, but **we do NOT store your password** – the password is just forwarded to the SAP Business One encrypted.
- to be able to register you will have to have a proper SAP Business One account. It is not necessary if you just want to use the demo account

You can select between 3 kinds of accounts:

- Demonstration (Demo) account – you can download a demo application with SAP Business One demo data, and use it (only offline, and only read-only – no synchronization possible). It is only possible to do it while using an emulator (being a part of Logotec’s service) - you cannot do it on a real device
 - Trial account – you can have (free of charge) mobile access to your own SAP Business One data without any functional limitation for 30 days. You can use for it your mobile device.
 - Full version
- Important for Trial and Full versions:**
Logotec Mobile@Connector Adapter for SAP - software that communicates between your SAP Business One and Mobile@Connector - needs to be installed on your server. For installation and configuration instructions see chapter “Installing and configuring Mobile@Connector Adapter for SAP”

Procedures for the Demonstration (Demo) version

To register for the “Demo account” it is not necessary to have any SAP Business One account, simply:

- go to www.MobileConnector.com/SAP, select the option “Demo” and register there (be sure to enter your proper email address);
- our system will give you the possibility to work with the demo account while using an emulator. The installation of the emulator will be performed automatically (you have to agree with this).

Important:

- You will not be able to change or synchronize your data – the demo application can be used only offline, and is read-only.
- You can use the demo application as long as you wish.

Procedures for the Trial version or the Full version

You will be able to use the Trial version or the Full version only if you have a SAP Business One account. **Logotec Mobile@Connector Adapter for SAP needs to be installed on your server.**

To register for the Trial or Full versions, simply:

1. go to www.MobileConnector.com/SAP, select the option “Trial” or “Buy” and register there (be sure to enter your proper email address);
2. you will be asked for entering your SAP Business One user and db passwords. We don’t store your SAP Business One passwords in our system – we just forward it (encrypted) to SAP Business One to identify your account;
 - **be sure that the SAP Business One server is accessible by Internet (the easiest check would be to try to access it not from your computer)**
 - **keep the web address of your server and Mobile@Connector Adapter for SAP ready**
3. our service will connect to your SAP Business One account, and display to you the detailed structure of your mobile application. The structure will contain all objects from your SAP Business One account. Because trying to include the full functionality of the sophisticated SAP Business One solution to a mobile device would easily overload your mobile device, the next step should be to decide, which objects have to be included into your mobile application. You will find more information in the chapter “Customizing Your Application”

4. due to the same reason you have to decide which data the system should store at your local mobile device (in the so called folder). The system tries to limit the amount of data in a default way, which, of course, not always fulfill your expectations. There are 2 possible situations:
 - if the status of your folder is OK, then you just push the button “Create/Update the application”. You also CAN - but not HAVE TO – change the default parameters before accepting the process. You will find more information in the chapter “Customizing Your Application”
 - if the status of your folder is not OK, the likely reason is that the default parameters that are automatically set by the system have selected too much data from your SAP Business One account for storing them on your local device. In such a situation, you HAVE to change the parameters that limit data loaded to the folder. You will find more information in the chapter “Customizing Your Application”
5. thereafter, the system will create your specific mobile application. The application will include the customization you performed in SAP Business One, and will also reflect the customizing parameters you set in the customization site. The system will send you an email informing you of the URL of your mobile application - the email will also contain all information necessary for you to use your application
6. after you connect to the URL using the Pocket Explorer on your mobile device, the system will automatically download and install your mobile application and your data on your mobile device (you can find more information in the chapter “Starting your mobile application for the first time”)
7. you will be able to use the application online, offline and also synchronize your local data with your SAP Business One account (in both directions). If you have selected the trial version, your use will be limited for 30 days. You will find more information in the chapter “Using your mobile application”
8. our system will also send you an additional email informing you about the URL of your customization site, the access key and the access password to this site. You can use this site any time you wish to modify your mobile application/create a new version of your mobile application. You will find more information in the chapter “Customizing your application”

Important:

Any time you change your SAP Business One account you HAVE to go to your customization site and re-create your mobile application (the newly created mobile application will reflect all the changes you made in you SAP Business One).

Important (concerns only the trial version): after your 30-day trial account expires you will not be able to get a new trial account for next 3 months.

Customizing your application

If you have customized the standard SAP Business One functionality (such as custom tables, forms fields descriptions etc.) it will be reflected in your mobile solution automatically.

Important: if you customize your SAP Business One account AFTER your mobile application is created, you will have to “force” the system to re-create your application again. Don’t forget to synchronize all your local handheld data to the server BEFORE making such changes in SAP Business One (or you can lose your changes at your handheld local data). You can re-create your mobile application using your customization site (the URL of your customization site will be contained in the email informing you about your account)

In addition to the customization made with the standard SAP Business One functionality, you can:

- define which objects (Business Partners, Contacts, etc.) should be included into your mobile application (you could limit which objects are selected, so that you don't overload the limited memory of your mobile device).
- define which objects should be stored in your local folder (by default, all objects of your application are included in the folder). If you exclude some objects from your local folder, you will still be able to access the data from the objects while you are operating online (but not offline)
- you can also define which records of the objects included in the folder should be downloaded (how many, how old, etc.)

Below we describe the possibility to customize your mobile application (additionally to the customization made in SAP Business One). In fact our solution gives almost unlimited possibilities of customizing your local application – we just limited it because our aim is not to overload you with too complex functionality. If the possibilities described in this documentation are not enough for you, ask for “Extended account”, please.

Use the customization site to define the parameters of your application.

Objects contained into your mobile application

You can define which objects (Business Partners, Contacts, etc.) should be included, and which excluded from your mobile application. By default all objects are included.

Objects included into your local folder

You can define which objects contained in your application (Business Partners, Contacts, etc.) should be stored in your local folder (by default all objects of your mobile application are included). If you exclude some objects from your local folder, you will still be able to access data from the objects - but only while you are running online.

Selecting the records from the folder objects

Since your handheld mobile device has limited amount of memory, it may not be possible to store all your SAP Business One data locally at your mobile device. Due to that reason you can define what subset of your data should be stored at your mobile device. You can define which records of the given object should be downloaded to the local folder (individually for any object included to the local folder). For any object you can define:

- whether the system should download only data created by yourself (by default), or all data to which you have access.
- how many of the newest records should be maximally downloaded (NOTE: not more than 5,000 records of any object types are possible, 2,000 is the default setting)
- the “age” of data which should be downloaded (for example: “Only Invoices from last 90 days”).

Important: Even if you choose to have only a subset of your data stored on your local device, you can still access all your SAP Business One data if you are online and you have turned your folder off (see the user manual for more information).

How can you customize your application?

You can customize your application (including the contents of your folder) by accessing your individual customization site. The link to that site is contained in the email which you will receive after registering for an account (either the trial or the real account – **customization is not enabled for the demonstration – demo - account**).

If you access your customization site for the first time (directly after registering at our service) the following screen will appear:

*SAP Business One DB user name	<input type="text"/>
*SAP Business One DB password	<input type="text"/>
SAP Business One user name	<input type="text"/>
SAP Business One user password	<input type="text"/>
SAP Business One DB type	MSSQL2005 <input type="button" value="v"/>
*Server address	192.168.1.69
*SAP Business One adapter Url	http://192.168.1.69/RemoteSapAdapte
License Server	<input type="text"/>
*Required field	<input type="button" value="Continue"/>

You have to enter your SAP Business One DB user name, SAP Business One DB password, SAP Business One user name, SAP Business One user password, Server address, SAP Business One adapter Url.

In License Server field enter IP:PORTNUMBER of server on which SAP Business One License Server is installed. Usually it's the same server on which SAP Business One Server is installed – in such case License Server field should be left blank.

If you enter your customization site next time, the login site will be slightly different:

Server address	192.168.1.69
SAP Business One DB user name	<input type="text"/>
SAP Business One DB password	<input type="text"/>
SAP Business One user name	<input type="text"/>
SAP Business One user password	<input type="text"/>
SAP Business One adapter Url	http://192.168.1.69/RemoteSapAdapte
License Server	<input type="text"/>
Access key	SA_57788
Access password	●●●●●●●●
	<input type="button" value="OK"/>

Any time you access your individual customization site you have to enter your SAP Business One DB user name, SAP Business One DB password, SAP Business One user name, SAP Business One user password, and also Access Key and Access Password sent to you after registering by email. You have to do it while accessing the customization site for the first time as well as accessing it after you already worked with your application.

After you enter the values, the system will ask you to choose database of your application and application language, after that you have to wait for about 3-5 minutes – thereafter the system will display a site containing the structure of your “large” SAP Business One application. Now you will be able to define/re-define your mobile application.

The first field (“Please choose a pre-defined schema:”) lets you decide which pre-defined schema you want to use for your mobile application (please, see the detailed information below).

Next field contains the name of your mobile application, which will appear at the start site of your application. By default the system uses the name “SAPBOMob” but you can modify the name.

Important: the name of the application is also an identifier of the application – due to this reason Mobile@Connector extends the name with numbers like “1, “2”, etc., if the name you chose already exist.

SAP Business One is a large application - the navigator structure contains almost 200 objects. Navigating such complex structure at a mobile device would drive any mobile device at its limits. Due to this reason it is very important to limit the functionality (the amount of the objects in the navigator’s structure) to a reasonable extend. Of course, the easiest possibility would be to let the user to select the objects in the structure himself. But because the structure is very large (as mentioned above: about 200 objects) this process would not be the best solution for the most users. To make it easier we offer so called “schemas”

Please choose predefined schema:

Force users to use safe connection only (https)

Name of your mobile application

Object list

Object type name	Include into your application	Include in the folder	Only objects created during last XYZ days myself	Only records created during last XYZ days	Maximum amount of records in the folder [the limitation is 5000 , or 500 for events/tasks]	The umber of records in the folder	STATUS
Financials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Chart of Accounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	220	In Folder
Journal Entry	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	74	In Folder
Posting Templates	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	0	In Folder
Recurring Postings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	0	In Folder
Sales Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sales Opportunity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	28	In Folder
Sales - A/R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sales Quotation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	10	In Folder
Sales Order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	360	2000	12	In Folder

A schema is a set of objects to be included in the application. The reason is to help user to mark necessary objects without being force to do it one by one with 200 objects.

We defined several schemas (the amount of them will be growing with the time, because of this we don’t try to describe them in detail – we rather want to let you understand the concept).

“Selected modules”

This schema is the default schema, and works as the following:

- if you select this schema you can go directly to the tree structure of your application, and you can select “module” (= part of the tree structure)
- usually there are 11 main modules in SAP Business One system (they are marked with a blue strip in the tree structure):
 - Financials
 - Sales Opportunities
 - Sales A/R
 - Purchasing A/P
 - Business Partners
 - Banking
 - Inventory
 - Production
 - Service
 - Human Resources
 - User Defined Windows

Please choose predefined schema: Selected modules ▼

Force users to use safe connection only (https)

Name of your mobile application:

Object list

Object type name	Include into your application	Include in the folder	Only objects created myself	Only records created during last XYZ days	Maximum amount of records in the folder [the limitation is 5000 , or 500 for events/tasks]	The number of records in the folder	STATUS
Financials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sales Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sales - A/R	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Purchasing - A/P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Business Partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Banking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

After selecting module, you can go deeper, and exclude/include some sub-objects from the structure defining the application precisely as you wish.

- **Other schemas: “Manager”, “Rep”, etc.**

Any other schemas also select a defined set of objects in the navigator tree, but - different than in the “Selected module”:

- the pre-selected objects can be located at several main modules not only in one
- the user can freely select/de-select other objects (there is no limitation to just one “module”)

- **Saving schema**

If you select specific objects, and you would like to save the definition for a later use, you can do it easily by using the button “Save my schema”.

If you do it, you will be able to use this schema in the future.

By default the system sets following parameters for your application:

- your mobile application includes no objects from your SAP Business One account – you have to select the objects yourself by using the schemas and modifying the selection manually (as described above)
- all objects you include into your application will also be included in your folder and – due to this – they will also be accessible in the offline mode. Of course, you can freely change it: you can decide yourself which objects should be included in the folder and which not (they will still be accessible in the online mode). Making the careful decision can radically limit the amount of data stored at your mobile device, which can increase the performance of your application, and – above all – the performance of the process of building folder/synchronizing data
- the objects in any folder contain records created not only by you but also by other people (all records that you have right to see). Of course you can change the selection
- the folder contains data that is not older than 30 days – it is just up to you use a longer period of time
- the limitation is set for 2,000 records of any object type (you can also change this number but the maximal possible number is 5000)

If the set limitation (the default 2,000 records, or any other number set by you) is exceeded, the status of the given object is “Not OK” - the status is displayed individually for given object. It is not possible to create your mobile application until the statuses of all objects are OK.

In such case you have to change the parameters of given object until the folder status will be changed to OK. You can do this by shortening the period (for example: only records created in last 30 days and not 90 days), by selecting only your own data (and not all data you have access to), or by changing the limitation of the number of records in the given object type (remember – the maximum value is 5.000 records). Only after doing this, you will be able to select the option “Create application”.

Any time you change the definition for an object our service contacts your SAP Business One server and display the number of records which will be included in your folder.

Important:

You can change the parameters of your application either before using your mobile application for the first time or anytime thereafter. If you do it after you already have worked with your mobile application there are 3 possibilities:

- a. You change object(s) which should be included to your application (you include or exclude an object - the first column. In this case the system has to generate a new version of your application. You will be force to download the new version of your application and the folder as well*
- b. You change object(s) which should be included in your folder (you include or exclude an object - the second column) In this case you will be force to download the new folder (but the application will be not changed)*
- c. You change only the amount of records in the objects. In this case it is not necessary to do anything – the system will make any changes automatically while synchronizing the data*

In case of a.) and b.) you will be force to download the new defined folder. Due to this mandatory download, PLEASE synchronize your data BEFORE changing the folder parameters (if you forget this, you will lose your local changes you made on your handheld unit that you have not already synchronized).

Administrating your mobile account

This chapter explains how you can use the Mobile@Connector service for managing mobile access for several users

Important: the functionality described in this chapter is accessible only if you have a Full account. If you are using the Trial account the functionality will be read-only (you will be able to see the information but you will not be able to use it).

When you create a mobile version of your SAP Business One application several situations are possible:

- your SAP Business One account used for log-in to our service doesn't have access to the SAP Business One roles (user management)
- your SAP Business One account being used for log-in to the Mobile@Connector service:
 - o can access the information in your SAP Business One role
 - o more than one role is defined

Let us explain the given situation more detailed.

Situation 1

If your SAP Business One account has no access to any SAP Business One role, the created application can be used only by you. It is obvious: even if such role exists, even if there are users registered in this role, the system isn't able to gain any information regarding the role and its users.

Situation 2

If your account has the access to the SAP Business One role, more than one role is defined, you will see the user list of your role, and you can decide, which users have right to use the application. After you do it, the created application can be used by all of them – the system will automatically notify them (by email) that the application is created, and how it can be used. You also can add a custom message to this standard, notification email.

This application can be used not only by yourself but also by all users from the ADMIN SAP Business One role. Please decide which users should have right to use this mobile application.

User name	Permission to use the application
manager	<input checked="" type="checkbox"/>
Andy	<input type="checkbox"/>
B1i	<input type="checkbox"/>
B1i1	<input type="checkbox"/>
B1i2	<input type="checkbox"/>

This application can be used not only by yourself but also by other users - if you allow them to do it. Please decide which users should have right to use this mobile application.

After you configure your application selected users from your role will be notified by email. The email will contain the link to the application, the link to the user manual, and additional, useful information. If you wish to add a short comment to this email (max. 512 characters) type the message below:

There are also other roles defined in SAP Business One. You can decide, which roles, and which users from given roles should have mobile access to their SAP Business One accounts. You also have to define which users have to configure the application for their roles - the application will be ready to use only after they configure the application.

Permission to have mobile access	Role name	Right to use	Right to configure	User name
<input type="checkbox"/>	USERS	<input type="checkbox"/>	<input type="checkbox"/>	Peter
		<input type="checkbox"/>	<input type="checkbox"/>	Sophie
		<input type="checkbox"/>	<input type="checkbox"/>	Jill
		<input type="checkbox"/>	<input type="checkbox"/>	Tony
		<input type="checkbox"/>	<input type="checkbox"/>	David

The users selected above, being responsible for configuring the application for their roles will be notified by email. The email will contain the link to the configuration site, necessary credentials, the link to the user manual, and additional, useful information. If you wish to add a short comment to this email type the message below:

[Create/Update application](#)

Re-configuring an application

After the application is already created, the system behaves as the following (the situation 1 and 2 means exactly same situations as described above):

When a person goes back to the configuration site, the person will be able to re-configure the application.

Situation 1

The changed application can be used only by the person who created it.

Situation 2

If the changes will concern not the application per se but only the folder (objects to be included in the folder, definition which records have to be included in the folder, etc.), the system will ask, if the changes in the folder definition concern all users who can use the application (default), or only selected users (in such case the folders of other users will not be changed).

If the changes will not only concern the data but also the application per se (folders to be included in the folder, definition which records have to be included in the folder, etc.), the system will create a new version of the application. The system will download the new version at the moment the users will connect to the server. The user will be notified about the changes by email.

The person not only can change the application, but can also manage the user list (some users can be included, some users can be excluded). Of course, the list cannot go beyond the user list of the given SAP Business One role. The concerned users will be informed about the changes by email, and after they log in while using the application (for example while trying to synchronize) the new, changed version will be downloaded to their devices

Managing changes in SAP Business One

After you make a change in your SAP Business One application your mobile application is not correct anymore – it doesn't include the changes. It can happen that the application – even being theoretically not correct - still works but you never can be sure if it is really the case.

This means that after you change your SAP Business One application, you should “re-generate” your mobile application as soon as possible. If more than one role exists, you have to inform the users responsible for the given role that they re-generate the applications as soon as possible also.

Starting your mobile application for the first time

Important: you can use any kind of connection while working with your mobile application. However if you are using it first time a big amount of data will be downloaded: the local database, the local part of the application and all data you need locally. Due to that reason consider using a fast and not expensive connection if you start the application first time.

1. go to the URL address of your mobile application (it will be send to you by email) using your Pocket Explorer built-in to your handheld mobile device.

Important:

- ***you can only use MS Pocket Explorer, you cannot use other browsers, like for example Opera!***
 - ***if there are additional browsers installed at your mobile device, be sure that they are not set as default browser!***
 - ***please reset your mobile device before connecting to the URL and be sure that you have at least 20 MB free memory***
 - ***the following description concerns installation at Windows Mobile 6.0 Professional and Classic devices. For differences concerning Windows Mobile 6.0 Standard, Windows Mobile 5.0, and Pocket PC 2003 devices, see additional comments following the installation description***
2. after the log-in site will be displayed at your screen, the system informs you that you do not have a “Mobile@Connector client” on your local device installed, and then starts the installation process automatically (you have to accept it).
 3. after the installation is completed, start Mobile@Connector client (Today screen → Programs → M@C). The system will display a window where you will be able to enter the URL of your mobile application. Click the “New” option, enter the URL (sent to you by e-mail), and click OK. The system will display the login site of your application – log-in using your SAP Business One username and password.
 4. thereafter the system automatically downloads the local part of the application to your local device (if you are using a slow phone connection it can take several minutes – but this long for

the first time only)

5. thereafter the system informs you that your application has to use local folder (you have to accept it), and starts downloading your local folder (a set of data you wish to store on your local device – this is described more fully in the chapter “**Folders**”), which also has to be accepted by you. The process of initially downloading and saving data to your local folder usually takes 10-20 minutes - the time depends on the folder size, connection speed and the “power” of your device as well. Don’t forget, that this process not only includes the downloading the data but also creating the proper database structure at your local device (local tables, fields etc.), and converting data to the format of the local database. After this process is completed, you can work online and also offline (with thousand of local records saved at your local device) – and use data synchronization when you go back online.

Important:

- *please reset your mobile device after downloading the folder*
- *if you refused downloading the folder, you can still do it any time using an option in “Quick menu” from your application (quick menu → Folder manager → selecting the folder → pressing the button “Download”. The option is possible only if you are connected/online. The Quick menu is accessible by a “Menu” link at the bottom-right part of the screen of your mobile application.*
- *If you encounter any problems while downloading your folder (such as losing the connection, problem with your device, etc.) you still can reset your device, start your application a second time (**after connecting to the Internet and working online!!!**) and continue to download your folder exactly from the point at which the download process was broken.*

Additional remarks concerning installation at devices older than Windows Mobile 6.0

All Windows Mobile 6.0 devices have Compact Framework 2.0 Service Pack 1 already installed in ROM.

At Windows Mobile 5.0 devices there is an older version of Compact Framework installed, and at Pocket PC 2003 devices Compact Framework is not installed at all.

Mobile@Connector for SAP Business One recognizes the situation, and installs Compact Framework 2.0 Service Pack 1 (at Pocket PC 2003 devices), or updates the older version (at Windows Mobile 5.0 devices).

Important:

If you are using an external memory card, you will be asked (during the installation process) where the Compact Framework has to be installed: at the external card, or at the main memory. Please, use for installing Compact Framework only the main memory!

All Windows Mobile 6.0 devices have MS SQL Server Compact Edition already installed in ROM. At Pocket PC 2003, and at Windows Mobile 5.0 MS SQL Server Compact Edition is not installed.

Mobile@Connector for SAP Business One recognizes the situation, and installs MS SQL Server Compact Edition at those devices.

Important:

- *In case of Windows Mobile 6.0 or 5.0 devices (except for Smartphones!) the installation of any component mentioned above (Compact Framework, MS SQL Server Compact Edition, and Mobile@Connector client) starts automatically.*
- *In case of Smartphones and Pocket PC 2003 devices the installation of the components does not start automatically. You will only be informed that the specific component is not installed, and you have to start the process manually. To do it, move to the bottom part of the login site,*

and click the link given link ("Install Compact Framework", Install MS SQL Server Compact Edition", "Install Mobile@Connector client").

- Please, reset your devices after installing Compact Framework or MS SQL Server Compact Edition, and be sure that you have at least 20 MB free memory

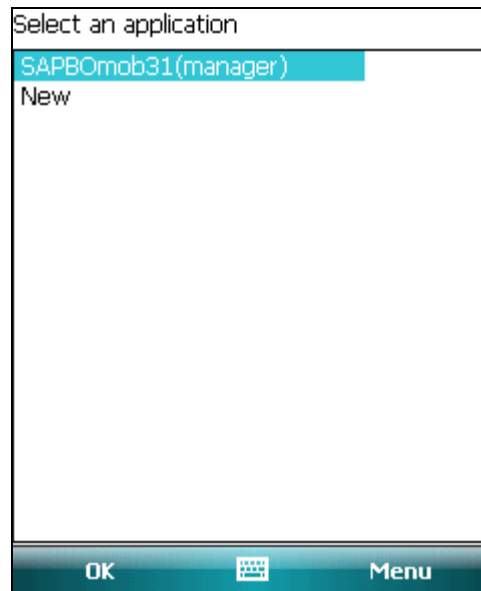
Using your mobile application

Starting your mobile application

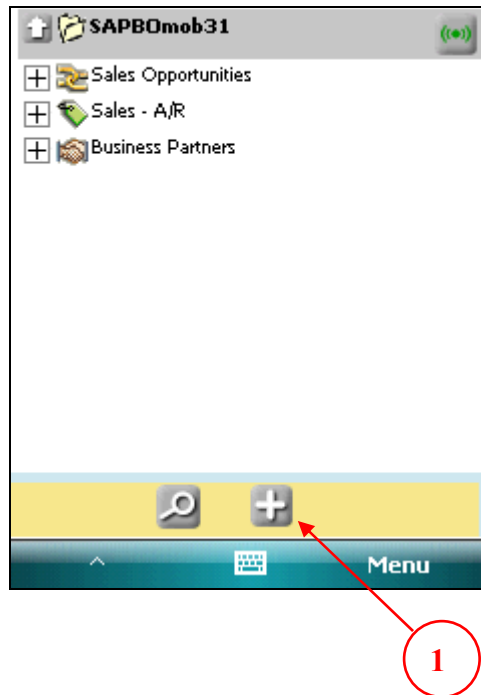
After the application and your local data are downloaded to your local device, and after you reset your mobile device (strongly recommended), you can start using your mobile application. After you go to Programs → M@C the system display a screen with the list of your applications – just select your application from the list and confirm the selection)

Important:

- *if you start the application while being disconnected the application will work offline. If you are connected while starting the application you will be asked for your decision: to work online or offline*
- *while downloading your solution for the first time Mobile@Connector automatically create an entry in “Favorites” of Pocket Explorer. Never delete the application from the favorite list – if you do it, Mobile@Connector will not be able to use your application*



Initiating your application will take about 20 seconds – thereafter you will see following screen



1 – Add new object

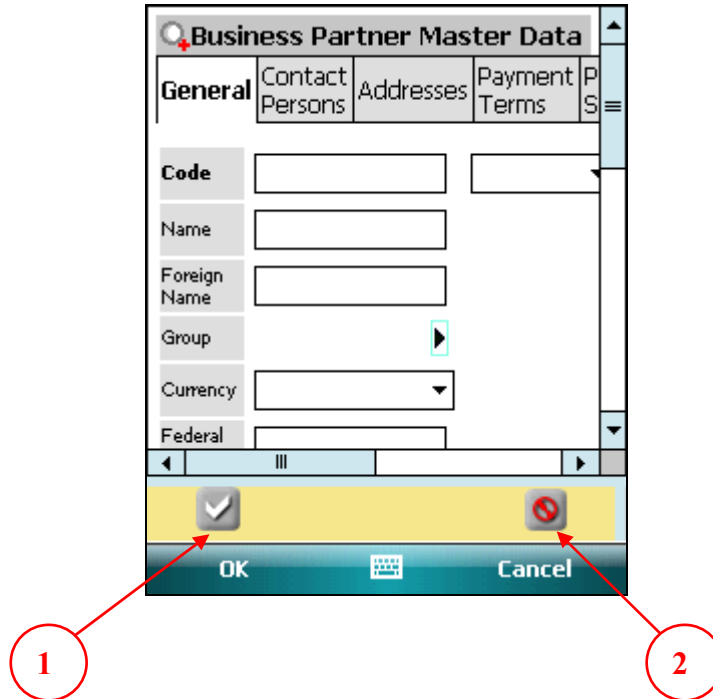
You can now navigate through the application structure (you can find more information in next chapters), but you also have possibility to add new object.

Adding new object

Using this function you can add new records very fast and easily (Activity, Business Partner Data, etc.). If you push this button the system displays a screen where you can select the wished object

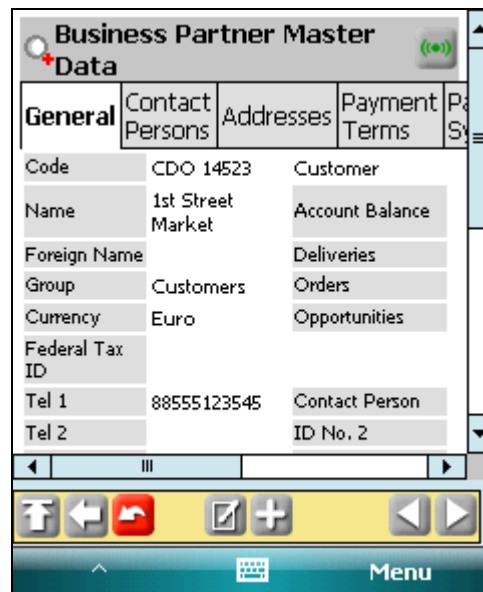


If you select, as example, “Business Partner Master Data” the system displays, after a few seconds, a screen allowing you to register a new Business Partner.



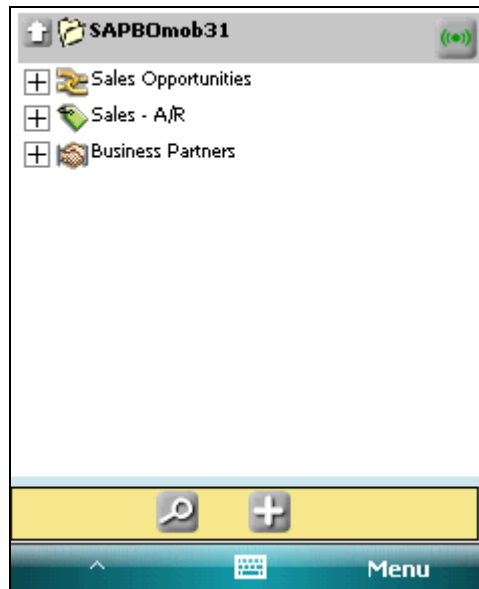
- 1 – Save
- 2 – Cancel


After you enter the necessary information push the “Save” button. System will ask you to confirm saving new record and displays newly added record in form view.



Information regarding smartphones

As you already realized most functions offered by your mobile application are accessible by buttons located in the toolbar.



In case of Pocket PC devices you just can push the given buttons with a stylus. In case of smartphones you can only use “joystick” (or its equivalent) to do it. To make accessing the toolbar easier while working with smartphones, we implemented a function represented by the  icon that moves the focus directly to the toolbar. It has not a big sense if you are working with a Pocket PC using stylus, but if you are using a smartphone, you can call this function just by pushing the associated key of your smartphone (the left key located directly under the screen). In this way you can access the toolbar very fast.

General information

Working with your mobile application, you have access to your SAP Business One data through two different views:

- the list view (tree structure/main menu of the application)
- form view

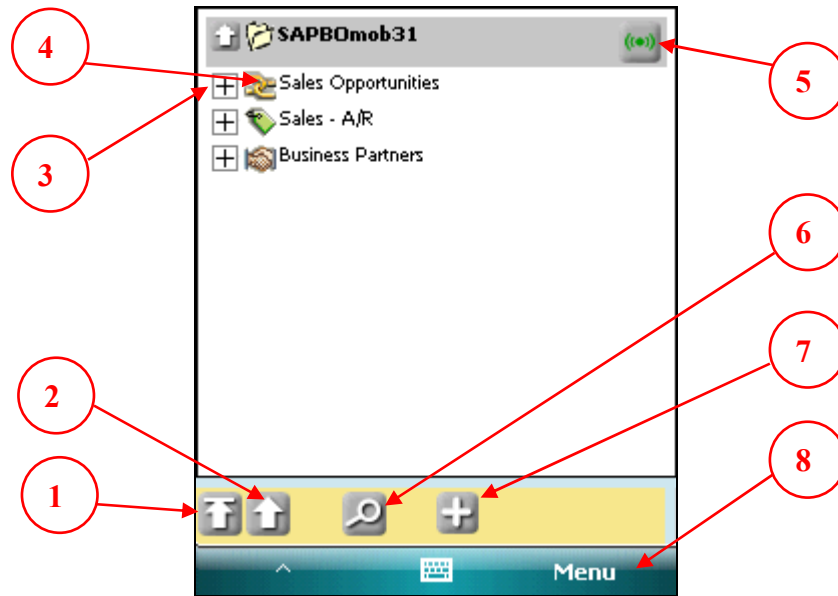
The tree structure organizes the access to all SAP Business One objects and their records.

Each object has – exactly as in the SAP Business One - a form containing all detailed data of a given record.

Very important:

Additionally to Forms/Tree objects representing Calendar and Tasks in your mobile application, you can use the standard Calendar and Tasks applications of your Pocket PC device. The data will be synchronized between them and your SAP Business One account (two-ways synchronization). Don't forget: that functionality can be used ONLY if you use folders!

Structure of the application window



The elements on the screen above have the following functions:

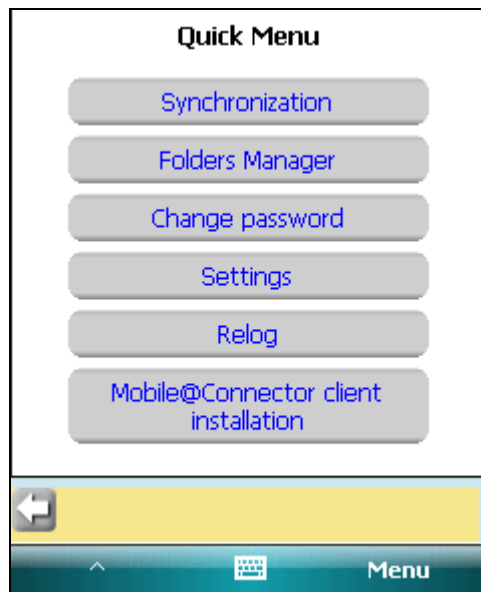
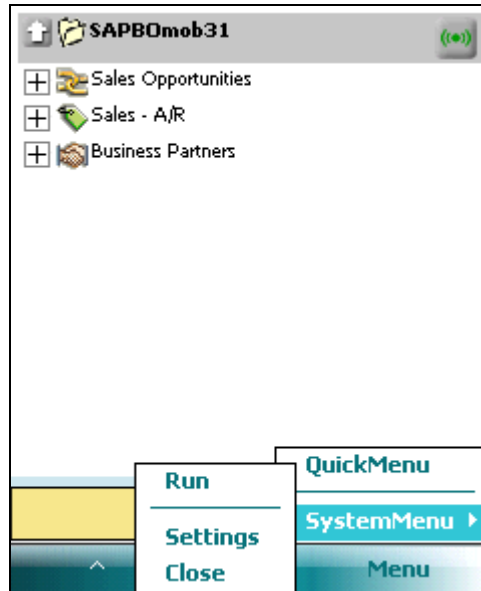
1. **back to the main menu**
Pushing the button will take you to the main menu of the application
2. **back one level higher**
Pushing this button takes you back one level higher
3. **go deeper**
Pushing this button takes you one level deeper (in this screen example, the system will show you the Sales Opportunities list)
4. **go deeper**
Pushing this button you go one level deeper (in this case the system will show you the Sales Opportunities list).

Despite similar functionality there is one difference between the buttons 3 and 4 - if you are working online (without using the local folder) the button 3 don't access the server (it just shows the last selected objects). Button 4 access the server and downloads new objects from the server (refreshes the information).

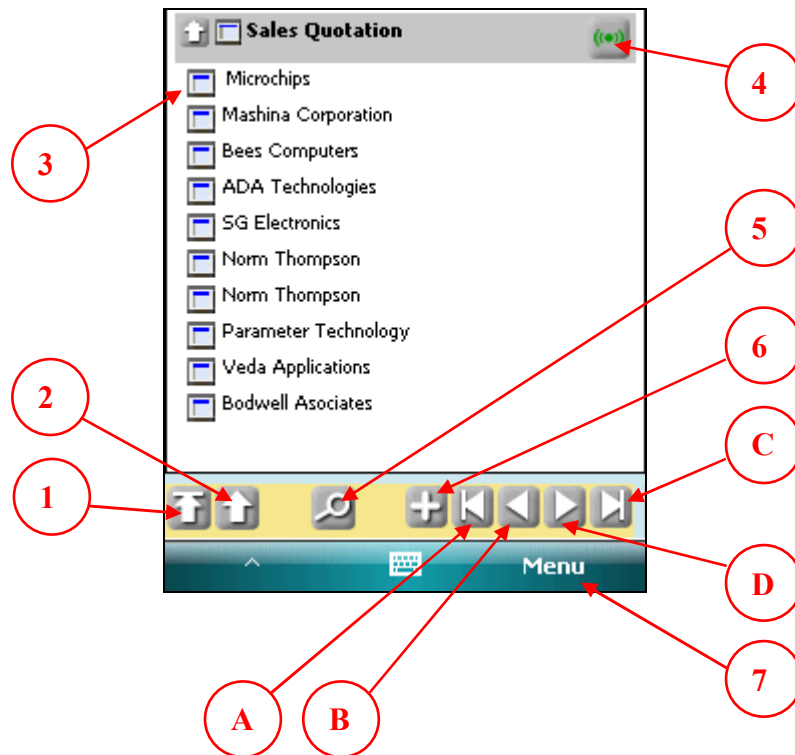
5. **online/offline icon**
The system shows current status (online/offline). You also can use it to set the desired status.
6. **filter**
It enables searching for specific records.
The behavior of this icon depends on the place where the button is used. For more information see the chapter related to searching
7. **Add new record**
This button allows you to add new record
8. **Menu**
Once you press the "Menu" button, you will see two positions there: **SystemMenu** and

QuickMenu. SystemMenu let you call functions like “Run” (start a new application), Close (close the current application), or Settings (system settings).

If you press the **QuickMenu** button you will see additional menu with functions like “Synchronization”, “Folders manager”, “Change password”, “Settings”, “Relog”, and “Mobile@Connector client installation”.



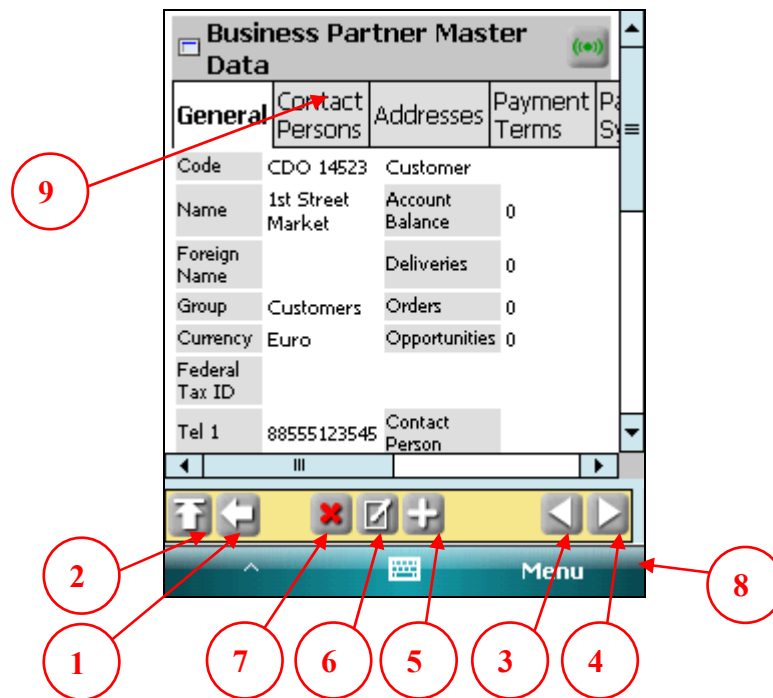
After you go deeper in the application tree structure (while using the 3 or 4 icons described above), you will see a list of the object's record.



The elements on the screen above have the following functions:

1. **back to the main menu**
Pushing the button will take you to the main menu of the application
2. **back one level higher**
Pushing this button takes you back one level higher
3. **switch to form view**
Pushing this button you switch to the form view of the given record
4. **online/offline icon**
The system shows current status (online/offline). You also can use it to set the desired status.
5. **filter**
It enables searching for specific records.
The behavior of this icon depends on the place where the button is used. For more information see the chapter related to searching.
6. **Add new record**
This button allows you to add new record
7. **Menu**
See above
- A. **Move to first records**
- B. **Move to previous records**
- C. **Move to next records**
- D. **Move to last records**

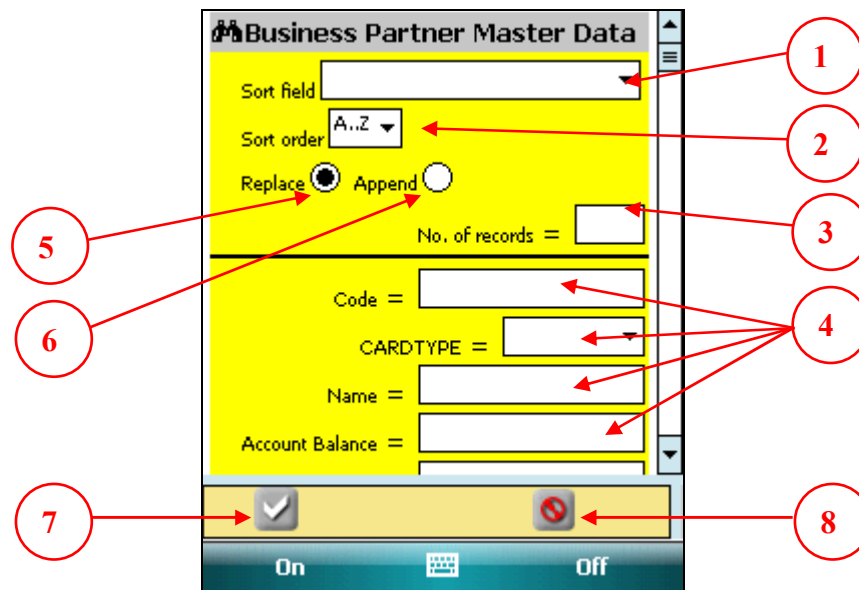
Form view



The elements in the screen above have following functions:

1. **back to the tree structure**
Pushing the button takes you back to the tree view
2. **back to the main menu**
Pushing the button will take you to the main menu of the application
3. **move to previous record**
4. **move to next record**
5. **add new record**
6. **edit current record**
7. **delete current record**
8. **menu**
9. **tabs**
Using it you can switch between specific parts or the form

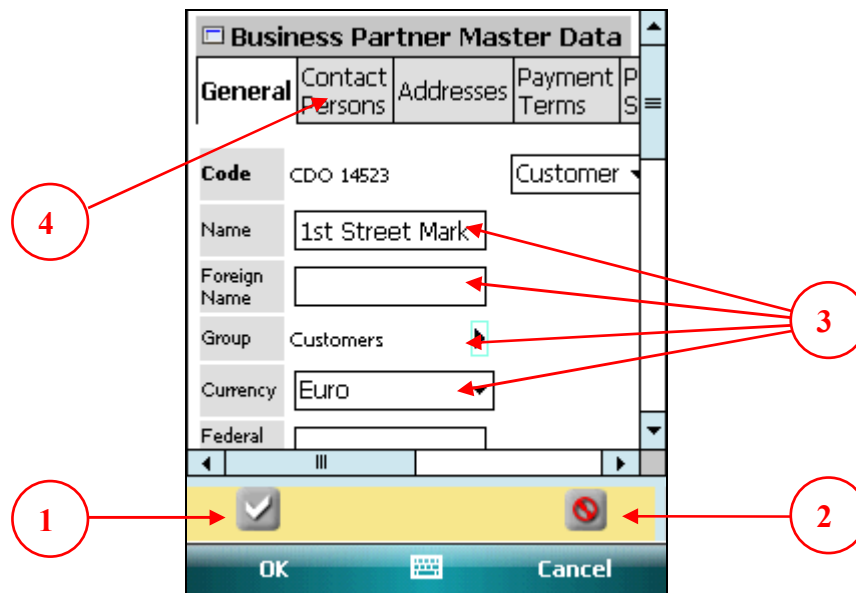
Filter view



The elements on the screen above have the following functions:

1. **Sort field**
You can decide if the records will be sorted in ascending or descending order
2. **Sort order**
You can select a field to be used for sorting the records
3. **No. of records**
maximum number of records returned
4. **Fields to be searched**
You can enter search criteria which have to be searched in specific fields
5. **“Replace” radio box**
If it is set to on - the new loaded data will replace the former data on the screen of your mobile device (you will see only the new data – the “old” data will disappear)
6. **“Append” radio box**
If it is set to on the new loaded data will be added to the data displayed on your screen previously (you will see the former and the new data)
7. **Search button – with filter**
The system searches for the data using the filter definition.
Important:
 - if you are using the folder, the system searches in the local data base on your local device.
 - if you do not use the folder, the system searches on the server if you are online, or locally if you are offline
8. **Search button – no filter**
The system is searching for the data IGNORING the filter definition.
Important: the rules for searching locally or on the server are same as describe above

Edit view



The elements in the screen above have following functions:



1. **Save**
If you press this icon all the changes you have made will be saved (locally, if you are using the folder or are working offline, or at the server directly if you are working online and do not use the folder)
2. **Cancel**
If you press this icon all your changes will be ignored (not saved)
3. **Fields of current form**
4. **Tags**
Using it you can switch between specific parts or the form

Searching

Using this function you can find records from given object type, containing specific text in chosen fields. To start search you have to decide which object type will be searched. Using application tree structure, click icon located on the left of Business Partners object, then click the icon on the left of the Business Partner Master Data. When you see the list of object's records, click filter icon at the bottom of the screen and after a few seconds, the system will show you the filter form.

Now you need enter search criteria, for example, you want to find business partners whose name contains word "tech", and you want to limit the result to no more than 5 records. Enter necessary data as on the following image:

After clicking search button "with filter", system will start searching data using filter criteria, and after a few seconds will show you result list:

If you want to return to list of all objects, click the filter icon , and then, on filter form, click "Search button – no filter" 

“Online and offline mode”

General information

Online mode

1. In the “online” mode you work while being connected to the server. The kind of the connection is not important – Mobile@Connector for SAP Business One supports any kinds of Internet connections (CDMA, GPRS, EGDE, UMTS, wireless LAN, cable connection etc.). If you change any data and saved the changes, it is saved directly on the server.
2. If you are connected, work online, and you lose your connection, the system will automatically switch to the offline mode. If you connect again the system doesn’t switch to online mode automatically (you have to switch back to the online mode manually).
3. If you don’t use the local folder and you change some data while you are in the offline mode, the system will prompt you to synchronize automatically after you switch back to the online mode.
4. If you do the same thing using the local folder the system doesn’t propose the automatic synchronization if you switch from offline to online – you have to start the synchronization process manually (quick menu → synchronization)
5. If you are not using the local folder and the online mode is switched to “on”, you are really working online. There is one small exclusion that is described in the chapter “**Using your mobile application**”
6. If you are using the local folder you do NOT really work online – even if you are connected and switched to “Online”. Even if you are connected and in the online mode the application works with data stored locally offline – you have to use synchronization to synchronize with the server.

Important: if you wish to switch to real online mode, and directly access the data stored on your server, you have to switch your folder off. You don’t have to delete it – you just switch it off. You can switch the folder on any time again (Quick menu → folder manager → selecting/deselecting a folder)

Offline mode

If you are using the local folder you can work in offline mode:

1. the system uses a local database (the only limitation is that there is a maximum of 5,000 records of any type). More information about the data which are contained in the folder you can find in the chapter “**Folders**”
2. all the data you need locally are downloaded with just one click
3. two-ways synchronization is being used (more information in the chapter “**Synchronization**”)

Synchronization

The synchronization can be divided into two parts:

- sending the local changes to the server
- searching for possible changes made at the SAP Business One server, and downloading them to your mobile device

Sending the local changes to the server

All the local changes are sent to the server in small packages. If there is a conflict the system shows the objects for which the conflict occurred with the proper information (all other records – with no conflict - are sent to the server).

Example of a conflict: you changed/deleted an object (record) but before you sent the changes to the server another person changed/deleted that object (record) at the server. As result the object you are sending to the server doesn't exist. In such a situation the system refuses updating the record and displays a proper message.

Searching for possible changes done at the server

The system searches for possible changes done at the server:

- records which have been deleted
- records which have been added
- records which have been modified

... and downloads the changes to the local device:

- the records deleted at the server are deleted locally
- the added records are added to the local device
- the modified records replace the old records

Important: in case of “deleted records” and “added records” the system not only looks for the records which have really been deleted/added but it also looks for records which don't fit to the folder specification. Example:

- ***if you have specified that your folder should contain your Sales Opportunities from the last 90 days, then***
- ***any time you synchronize, the system also checks for Sales Opportunities which are older than 90 days and deletes such records from the storage on your local device. As a result you will have on your local device only the newest Sales Opportunities from the last 3 months.***

Starting synchronization

The synchronization works differently when you are using local folder (recommended) than when you are working without local folder (not recommended).

Working without the folder

If you changed any data in the offline mode and turn on the online mode, the system proposes synchronization automatically.

As described above, only one-way synchronization is used.

Working with the folder

When working with the data saved in a folder - you are working offline ANY time (even while being connected to the Internet). Because of this reason you have to start the synchronization process by yourself. Starting synchronization: Quick menu → Synchronization

Important:

- *before starting synchronization be sure that you are connected to the Internet and in the online mode!!!*

Folder

Folder is a set of data stored locally. If you start your application for the first time, the system downloads the folder automatically. If you change the definition of your folder thereafter, you can download the folder manually (Quick menu → Folder manager → Load). For more information see in the chapter “Customizing your application”. After having your data downloaded, you can use it data locally, and synchronize with the server any time you wish (two-ways synchronization described in the former chapter).

Very important:

If you want to use your mobile application with your SAP Business One Calendar and Tasks, you HAVE to use folder mode. Without using folder, you will not have access to the data from these objects. As is the case with any objects contained in folder, your events and the to-do list can be used only offline and the synchronization has to be initiated by you.

If the possibilities to define the folder content described in the chapter “Customizing your application” are not sufficient for you, ask for the “Extended account”.

Installing and configuring Mobile@Connector Adapter for SAP

Communication between Mobile@Connector and SAP Business One requires installation of Mobile@Connector Adapter for SAP. Necessary steps are described below

Step 1 –Hardware configuration

Adapter software should be installed on computer with MS Windows and Internet Information Server. Webpages published on this computer have to be visible from the Internet (computer must have IP address visible from Internet)

Step 2 – Software installation

SDK DI API from SAP installation package have to installed. After installing API, adapter installation should be started - run setup.exe file. Adapter installation software asks user to enter virtual directory name (default is „RemoteSapAdapter” – fig.1). If default directory name will be changed, new name have to be entered in Step 4 too.

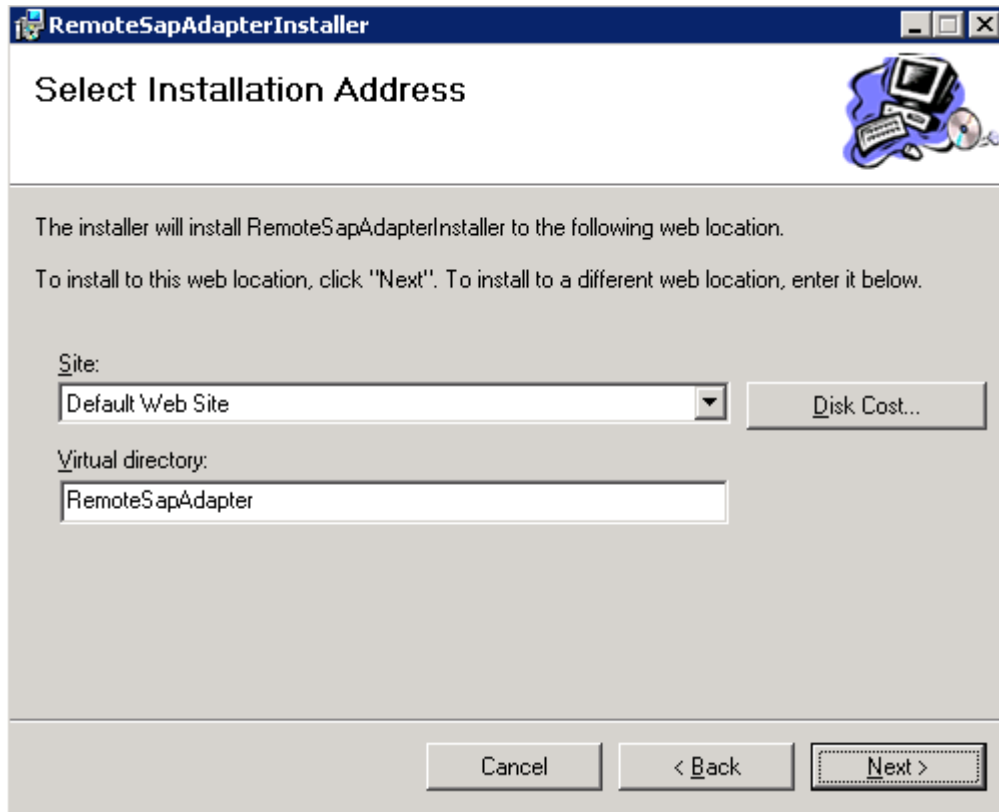


Fig. 1 - Installer window

Step 3 – Software configuration

Adapter configuration

After installing, adapter needs following configuration:

1. Control Panel -> Administrative tools -> Component Services.
2. Click on Component Services -> Computers -> My Computer -> COM+ Applications.
3. Right click on SapAdapter then chose Properties.

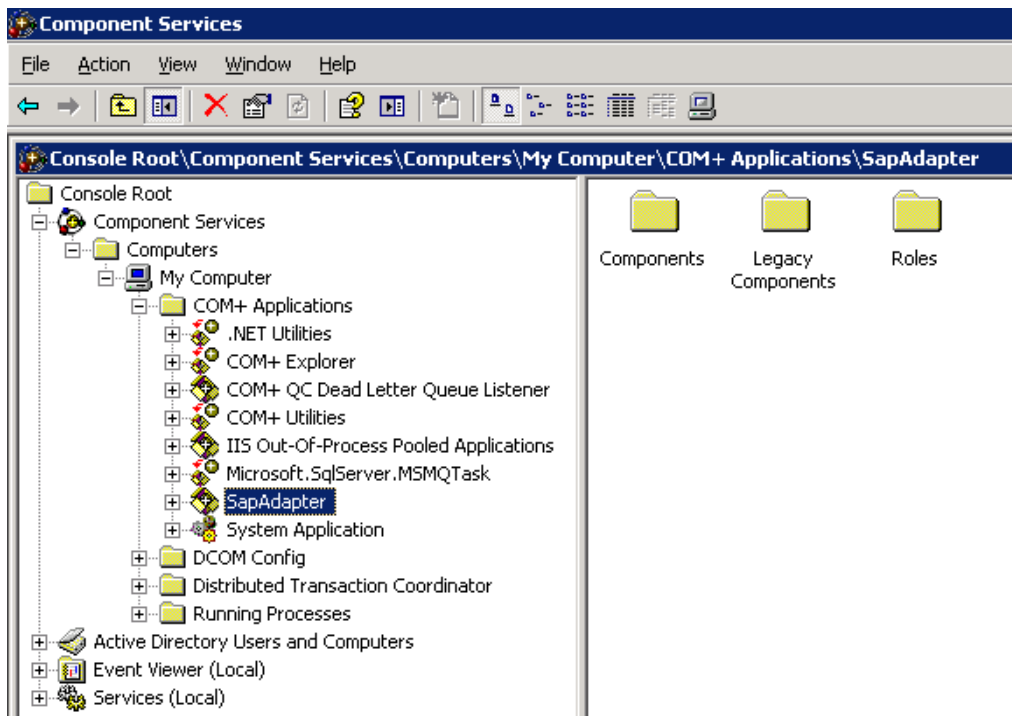


Fig. 2 Components services window

4. In Identity tab enter login and password for local user from Administrators group

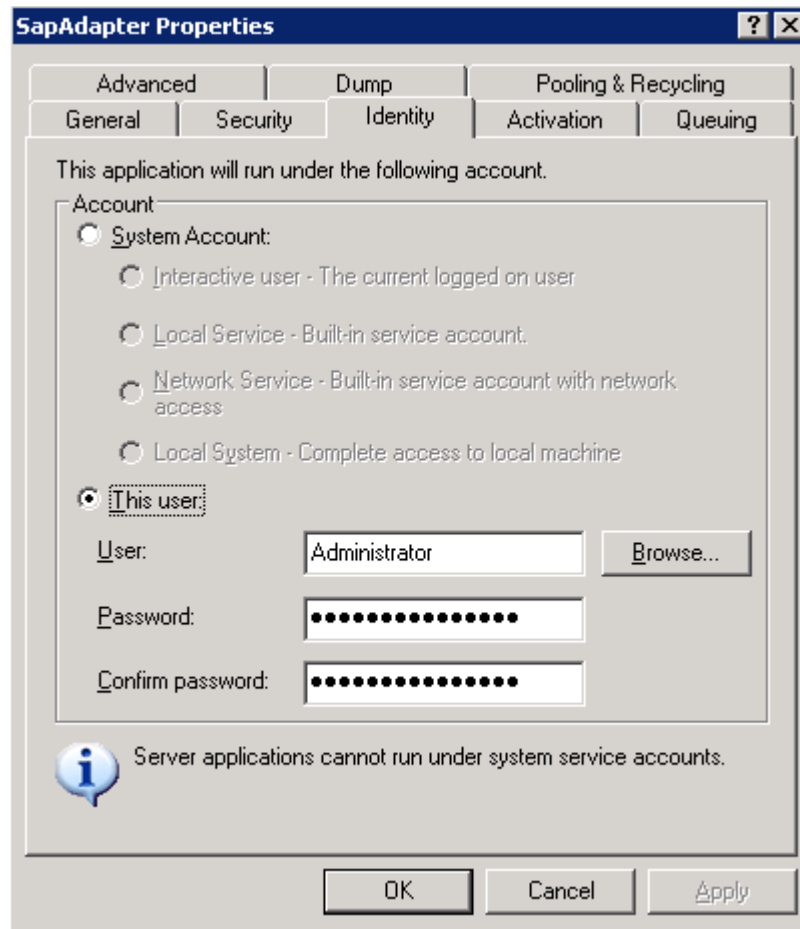


Fig. 3 SapAdapter COM+ application properties window

5. In Advanced tab, option “Leave running when idle” should be checked.

The next step can be omitted when there is possibility to connect to SAP Business One from the SAP Client (from the computer where the adapter is installed).

Firewall configuration

In case of using firewall software, following programs should not be blocked:

- SAP Business One.exe
- B1License.exe
- SqlSrvr.exe

Following ports should not be blocked:

- SAP license server port – default is 30000.
- SQL server port – default is 1433.
- Additionally, „File and Printer Sharing” should not be blocked.

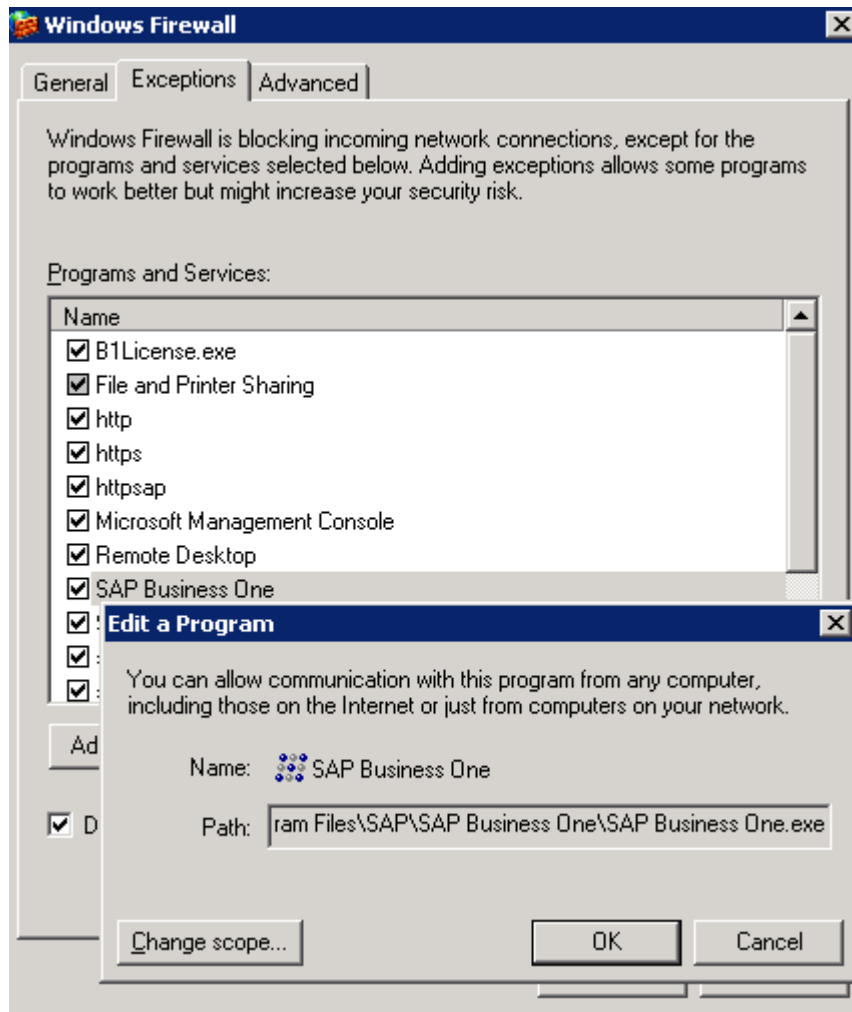


Fig. 4 Sample MS Windows Firewall configuration window

Step 4 – Testing adapter installation

To check if adapter installation is proper, enter following address in web browser:

http://IP/APP/Adapter.asmx

where:

IP – external IP address of computer with adapter installed

APP – virtual directory name (default: „RemoteSapAdapter”), or new name entered in Step 2.

Web browser should display page 'Adapter Web Service' (Fig.5).

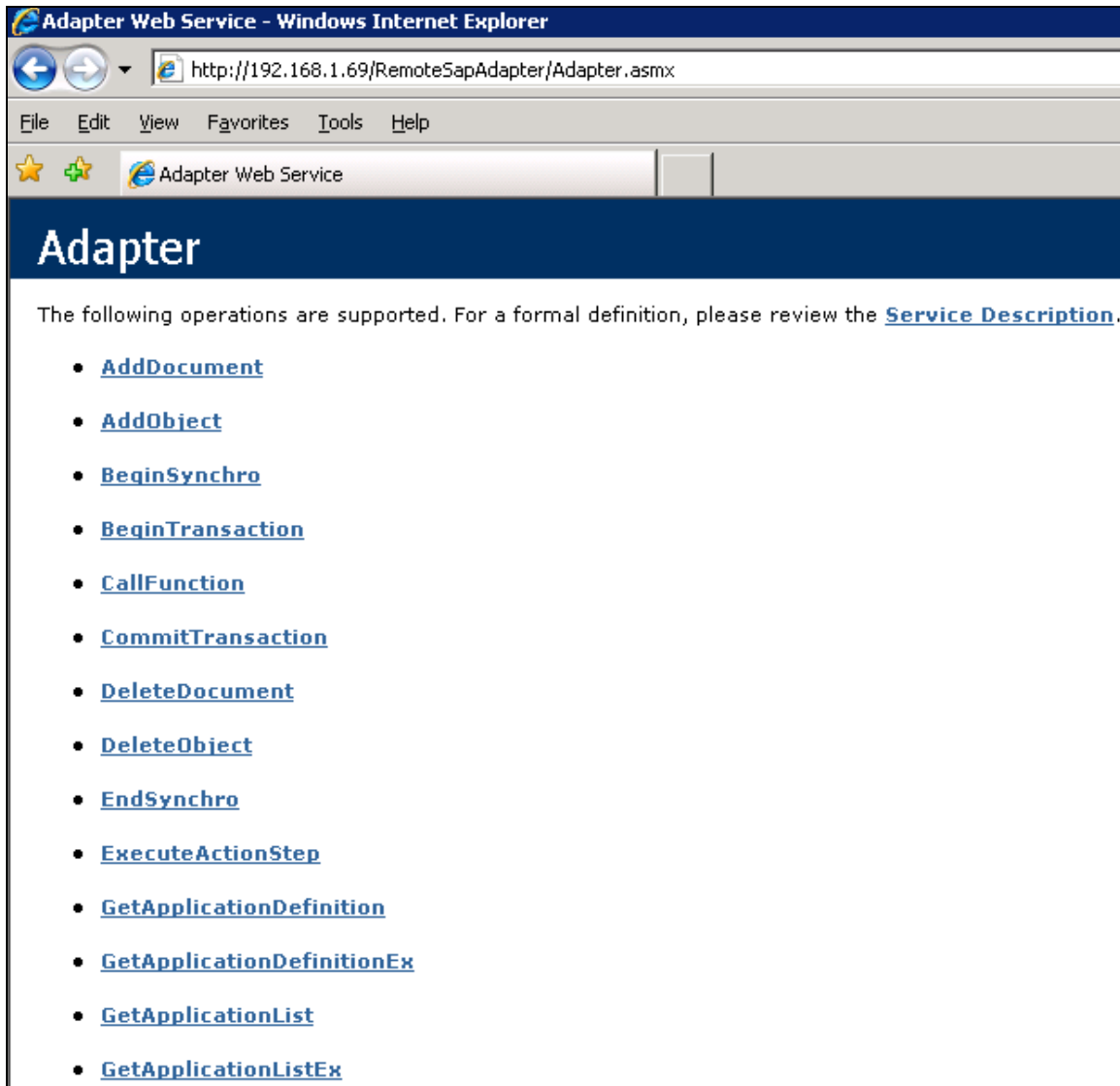


Fig. 5 Web page generated by adapter

Web page above should be visible on computer with adapter installed and on computers connected to the internet.

Additionally, on computer with adapter installed, adapter methods should be checked by clicking 'SelfDescribe' link (on web page above). Page like this on Fig. 6 should be shown as a result.

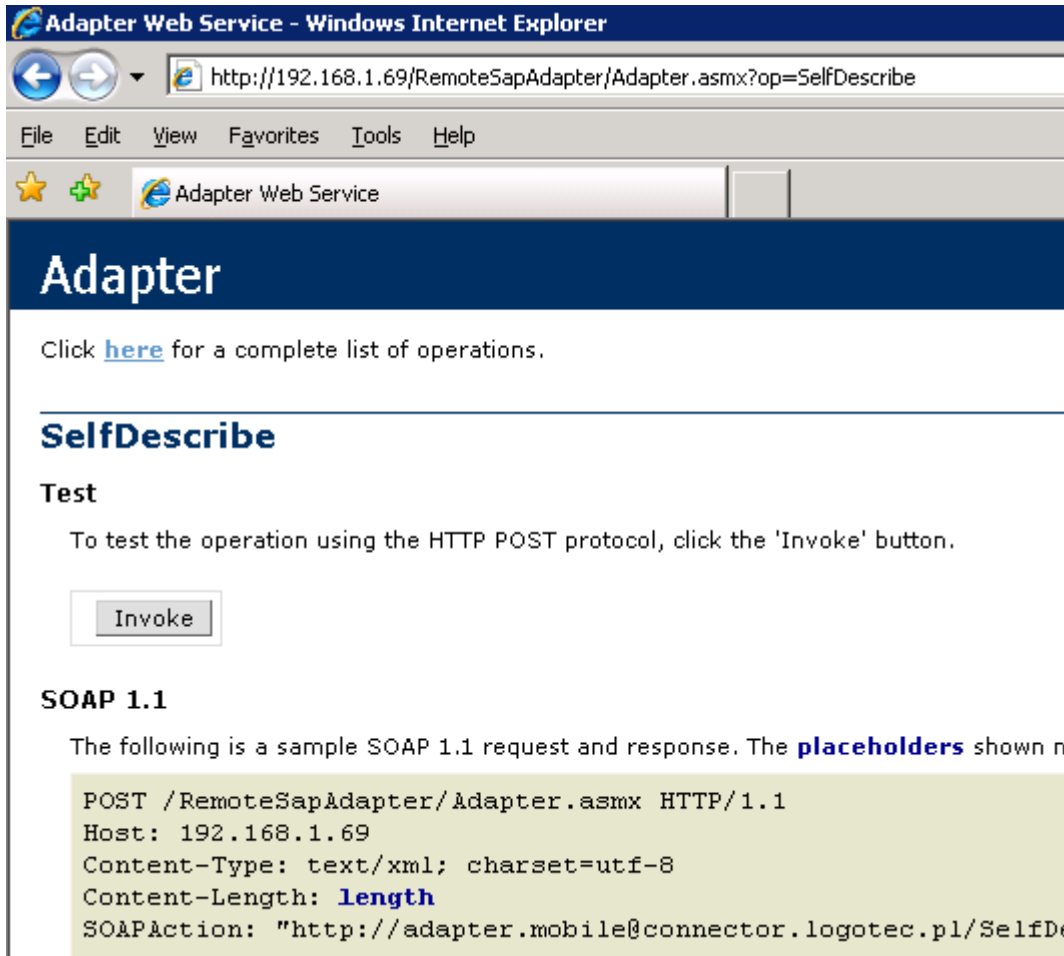


Fig. 6 'Self describe' web page generated by adapter

Click „Invoke” button and if following page will be shown, adapter is installed properly

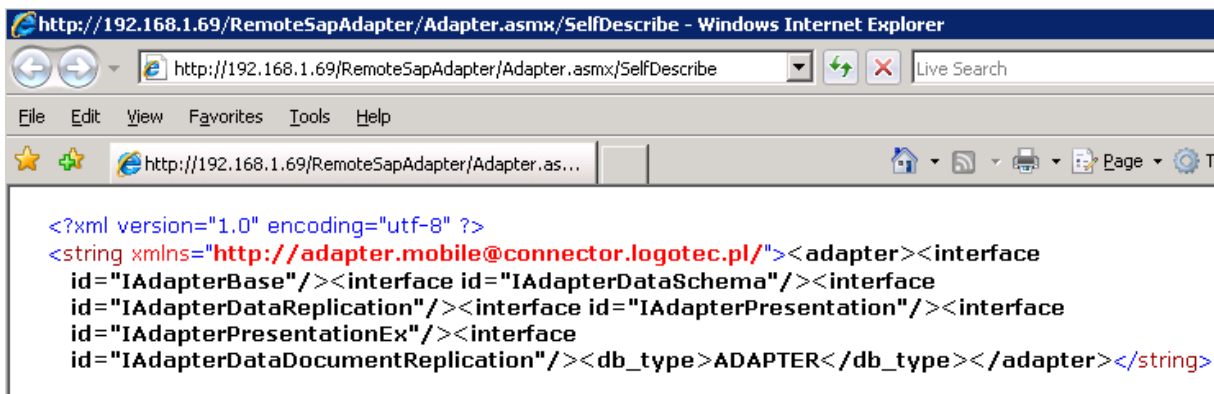


Fig. 7 Web page generated by adapter

Additional information

If you need additional information, please contact us – we will do our best to help you.

Email: SAP_TRIAL@logotecengineering.com

Phone:

- US: +1 301 330 2995
- PL: +48 32 222 9330