



# Sage 200 Mobile Getting Started Guide : Blackberry

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# Sage 200 Mobile Getting Started Guide : Blackberry

## Install Sage Mobile

Sage 200 Mobile provides you with secure access to your Sage 200 data from your BlackBerry® smartphone.

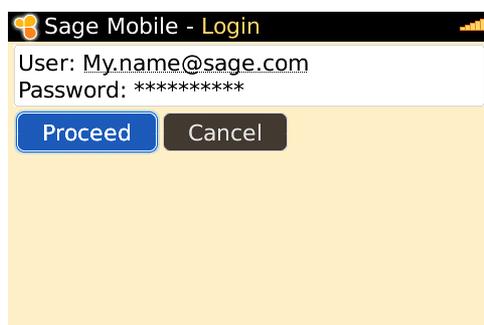
To install Sage Mobile on your phone, download the Sage 200 Mobile application from the Sage website at: [sage.co.uk/Sage200Mobile/SignUp](http://sage.co.uk/Sage200Mobile/SignUp).

## Open Sage Mobile

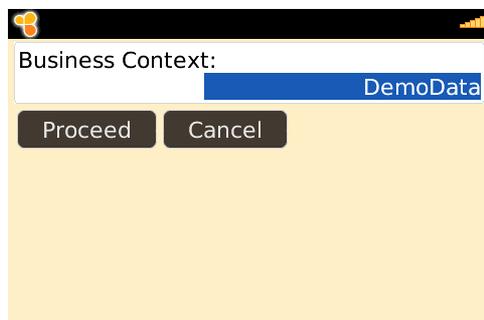
To open Sage Mobile you will need to have a Sage Passport, and your company's system administrator must have set you up as a Sage Mobile user.

**Note:** If you do not have a Sage Passport, either contact your system administrator or visit [sage.co.uk/Sage200Mobile/SignUp](http://sage.co.uk/Sage200Mobile/SignUp).

1. Open the Sage Mobile application.  
You will be prompted to log in.
2. Enter the User email address and password for your Sage Passport, then select Proceed.



3. If there is more than one company, select the company you want to work with from the Business Context, then select Proceed.



## Checking your connection

The dots in the top right of the Mobile application show the status of the connection to your company data.



- 4 green dots: Connection is OK.
- 3 green dots: Connected to your server, but problem accessing the company data.
- 2 green dots: Problem connecting to your server.
- 1 green dot : Problem connecting to the Sage server.

## Using views

A view is a Sage 200 workspace that has been made available for use with Sage Mobile.

Some of the views that can be used in Sage Mobile are:

- Cash Position.
- My Sales Summary.
- Project Position.
- Sales Revenue Position.

To use a view:

1. Open **View** from the Sage Mobile menu. A number of different views are displayed.



2. Select the view to open. In this example, we'll open the **Cash Position** view.
3. To display other information from this view or details for a selected item, press **Menu** (or click the trackball) to display a menu.



- To return to the previous page displayed in a view, use the *back* button.

## Using searches

Use a *search* to look-up information. Sage Mobile includes a number of searches, such as:

- Customers.
- Customer transactions.
- Sales orders.
- Stock items.

In this example, we will use the **Customers** search to find out some details about a customer.

1. Open **Search** from the Sage Mobile menu. The types of search are displayed; we'll select the **Customers** search.

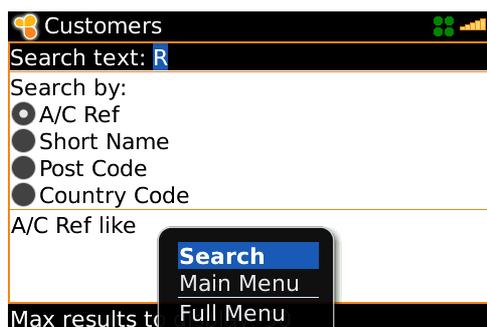


2. Enter the text that you want search for.

**Note:** Entering a single character will search for items that *begin* with that character; entering more than one character will search for items that *contain* those characters.

We'll search for a customer **Account** names beginning with the letter **R**.

To start the search, press **Menu** (or click the trackball) and select **Search**.



3. The search results are displayed.

To display details for the selected customer, press **Menu** (or click the trackball) and select **View Details**.

A/C Ref	Balance
Name	Credit Limit
ROS001	£ 5,038.52
Rose & Woodpack...	£ 50,000.00
RYA001	£ 12,616.37
Ryan Warehouse C...	£ 50,000.00

View Details  
Add to Favourites  
Main Menu  
Full Menu

**Note:** By default only the first 50 results are displayed. To change this, open the Blackberry Options > Sage Mobile, and set Max Results to display.

4. The customer details are displayed.

Customers: 'ROS001'  
Current at Wed, 9 Jun 2010 14:43:05

A/C Ref:	ROS001
Balance:	£ 5,038.52
Name:	Rose & Woodpack & King
Credit Limit:	£ 50,000.00
Short Name:	Rose
Base Bal:	£ 5,038.52
Country:	Great Britain
Priority:	C
VAT No:	326 3047 87

## Using favourites

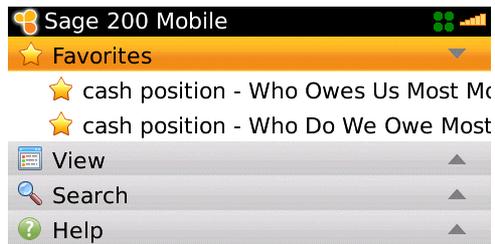
If you regularly look-up the same information using a search or view, you can save it as a favourite.

### To create a favourite

1. To add a view or search as a favourite, press Menu  (or click the trackball) and select **Add to Favourites**.
2. You can change the title of the favourite before it is added.

### To open a favourite

1. Open **Favourites** from the Sage Mobile menu. Your saved favourites are displayed.



2. Select a favourite to view.

## Using help

To get help for Sage Mobile:

1. Open **Help** from the Sage Mobile menu.



2. To view help on how to use Sage Mobile, select Sage Mobile Help.