

## **iPhone Mobile Rep**

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## **1. Introduction**

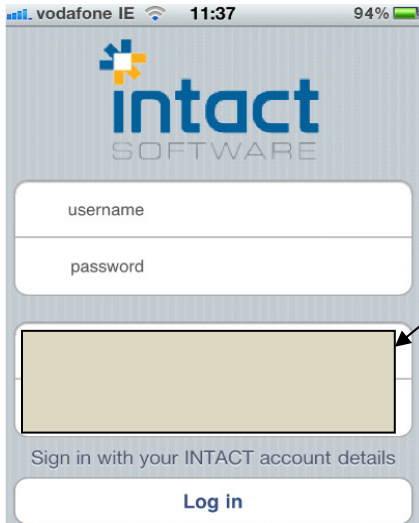
The iPhone Mobile Rep application allows Sales Reps to access live information from their Apple iPhone.

The Rep can:

- View customers details and history
- Sales Orders by Status
- Quotations by Status
- Accounts Statements with drill down to transaction level
- CRM Activity
- Check Stock Levels & Pricing
- Place a Sales Order for a customer
- Create a Quotation for a customer.
- Record CRM Activity

The following tutorial illustrates each of the above facilities.

## 2. Login & Menu Overview.



On launching the iPhone Mobile Rep application, the Login screen is presented.

The Public IP Address of the Server storing the data is displayed, as is the Port Number to which the iPhone traffic is sent.

The Rep enters his Username & Password, and taps the Log In button.

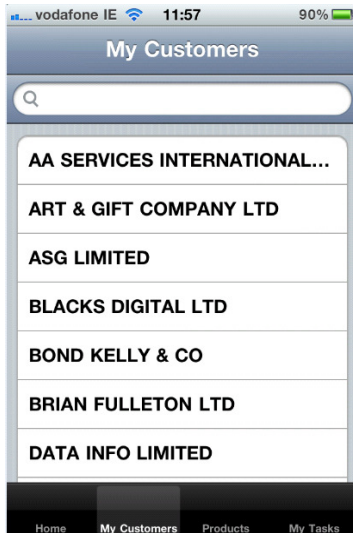
### 2.1 Main Rep Screen



After logging in, the Main Rep Screen is displayed.

Like all iPhone Apps, Options are selected by tapping the relevant menu bar.

### 3. My Customers



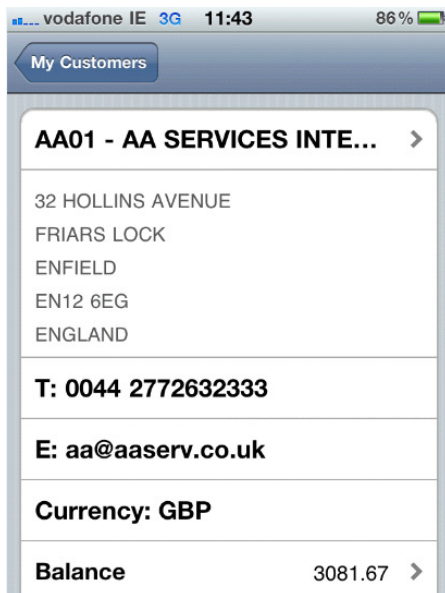
<b>Unbilled</b>	0.00
<b>On order</b>	57163.23 >

Tapping the “My Customer” bar displays all of the Rep’s customers and only his customers!

An important point to remember when using this iPhone App is that, you can refresh the current screen to display the latest information by “dragging” or scrolling the screen and releasing it.

Tap the required customer to display his information . We are going to tap “AA Services”.

#### 3.1 Customer Display.



Tapping the name will display the Activity history for that customer.

Tapping the address will open Google Earth and show the exact location of the customer.

Tapping the Telephone Number will launch the phone facility with the customer’s phone number already selected for dialing.

Tapping the Email address will launch the email facility with the customer’s email address already selected.

Tapping the Balance will display a Statement for the customer.

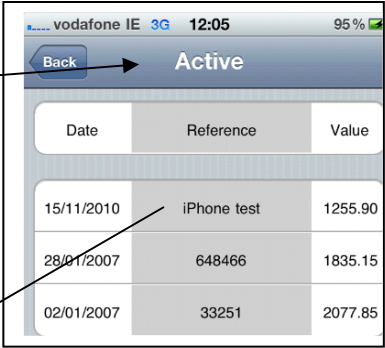
Tapping the Unbilled will allow one to drill down to the Delivery Headers and delivery details.

Tapping the On Order will allow one to drill down to the order headers and order details – see next Page. This shows the same information as Tapping the Orders button on the bottom menu.

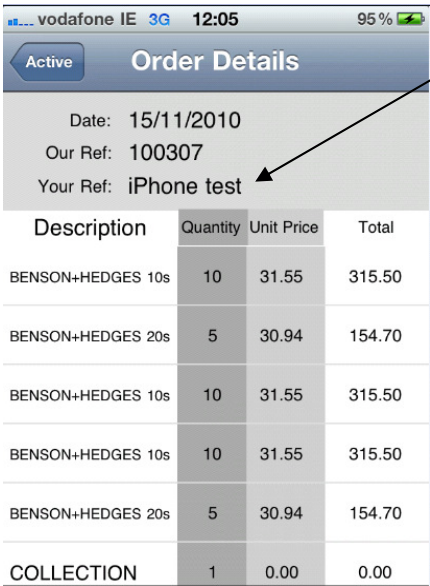
**3.1.1 Orders.**



Tapping a Status will open the Order Headers for that Status.



Tapping an Order Header will drill down to the underlying items of that order.



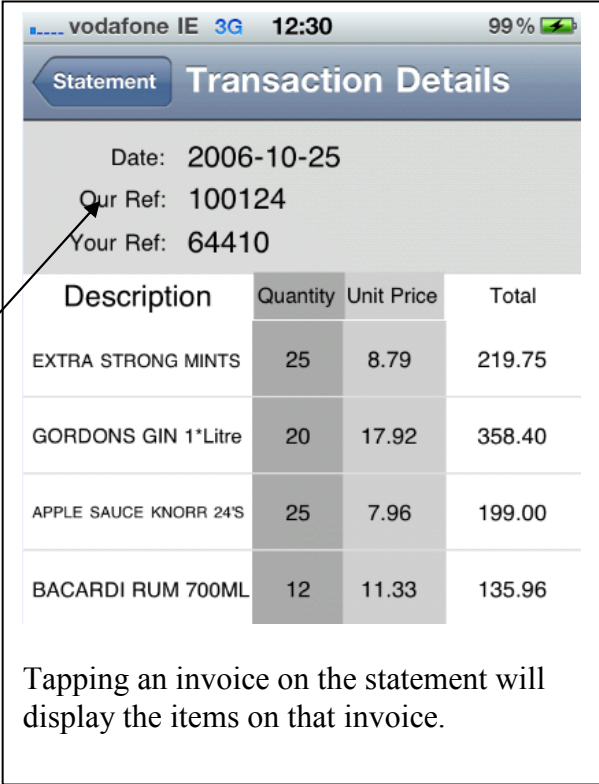
**3.1.2 Statement.**



Tapping the Statement button displays the customer's statement:



Date	Type	Debit	Credit	Balance
2006-12-31	I	1619.40	0.00	3081.67
2006-10-25	I	913.11	0.00	1462.27
2006-10-04	I	549.16	0.00	549.16
2006-10-02	R	0.00	3659.67	0.00
2006-09-23	I	1495.02	0.00	3659.67
2006-08-14	I	2164.65	0.00	2164.65



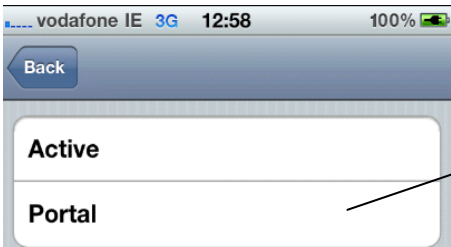
Date: 2006-10-25  
 Our Ref: 100124  
 Your Ref: 64410

Description	Quantity	Unit Price	Total
EXTRA STRONG MINTS	25	8.79	219.75
GORDONS GIN 1*Litre	20	17.92	358.40
APPLE SAUCE KNORR 24'S	25	7.96	199.00
BACARDI RUM 700ML	12	11.33	135.96

Tapping an invoice on the statement will display the items on that invoice.

### 3.1.3 Quotes

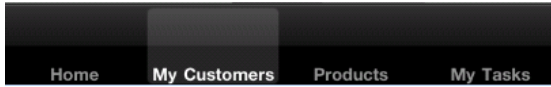
Tapping the Quotes button displays the Quotation Statuses. Tapping a Status will display all the Quotations of that Status.



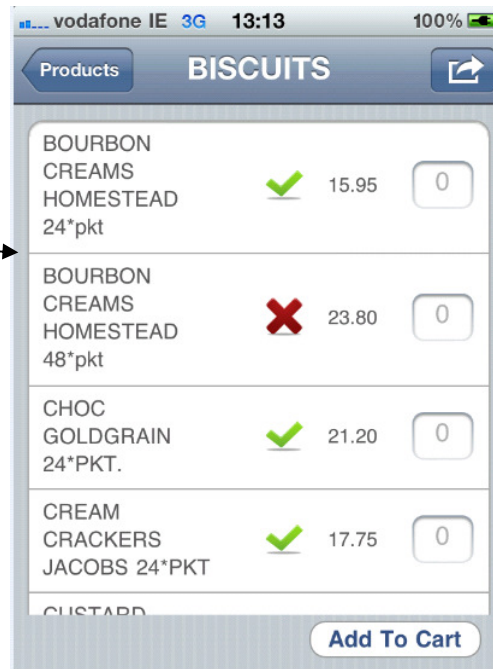
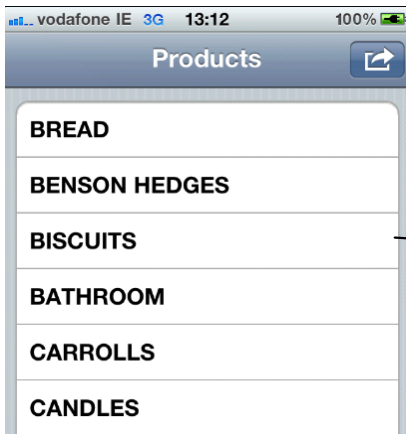
Tapping a Quote Header, will display all of the items in that Quote.



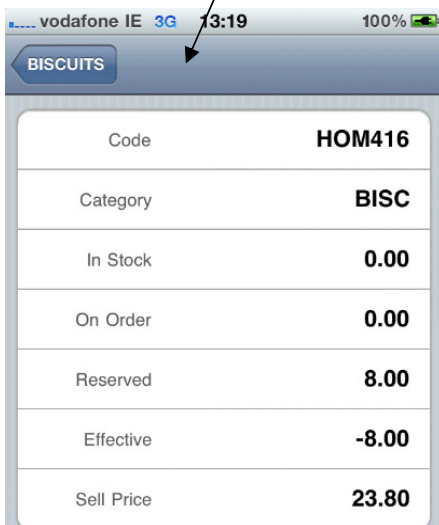
#### 4. Products




This is the area where sales quotations and/or sales orders are created. Tapping the Products option displays the Product Categories.




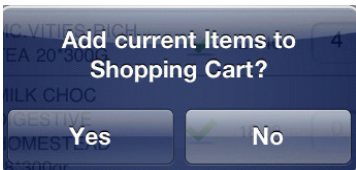
Tapping a Product category displays all the items in that Category with the facility to “Add to Cart”. A red X indicates insufficient stock. Tapping an item will display the Stock Status screen for that item.




This Stock Status screen shows that there is Zero in stock, an existing order or orders, for 8, nothing on Purchase Order, giving an effective stock of minus 8. It also shows the selling price of the item

Continue adding items to the Cart as required. When finished, Tap the  icon in the top right-hand corner.

When the  is tapped, the user is prompted to add the items to the Shopping Cart:

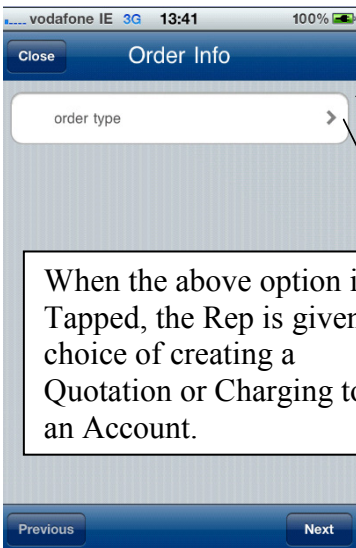


After Tapping the YES option, the screen displays a Summary of the items selected:

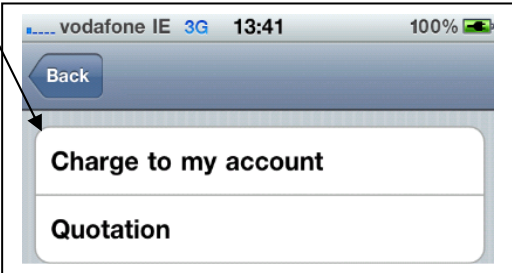


Item	Quantity	Price
BOURBON CREAMS HOMESTEAD 24*pkt	2	15.95
BOURBON CREAMS HOMESTEAD 48*pkt	4	23.80
CHOC GOLDGRAIN 24*PKT.	5	21.20
CREAM CRACKERS JACOBS 24*PKT	5	17.75

Tapping the Checkout button displays the Order Info screen – see opposite!

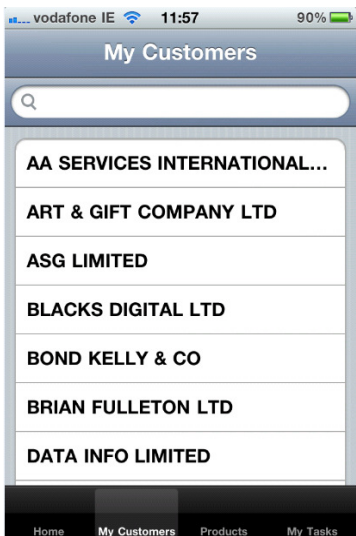


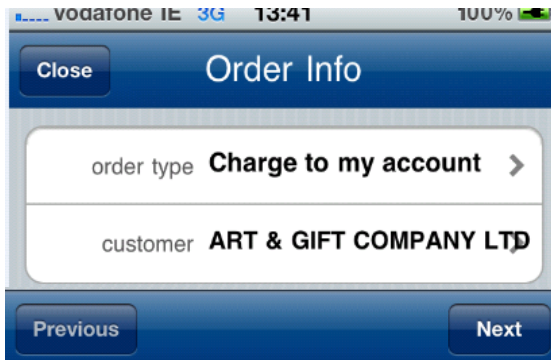
When the above option is Tapped, the Rep is given a choice of creating a Quotation or Charging to an Account.



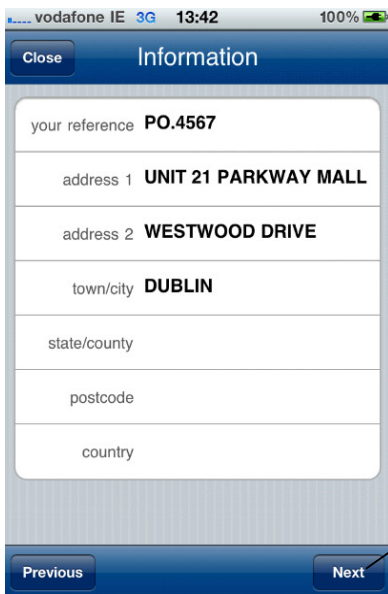
Tapping the “Charge to my account” , option displays the customer list.

Tap the customer for whom the order is being taken.

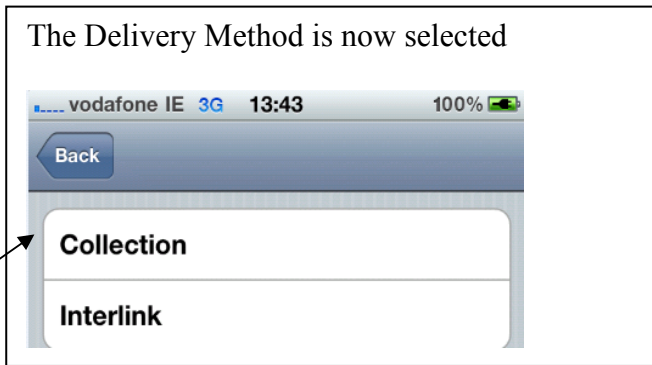




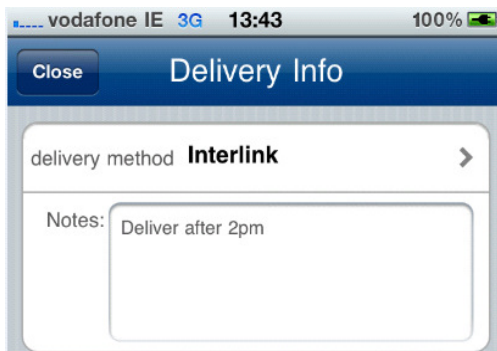
After the customer is selected, the screen gives the Rep the opportunity to “Previous”, or to proceed to the next stage by Tapping Next.



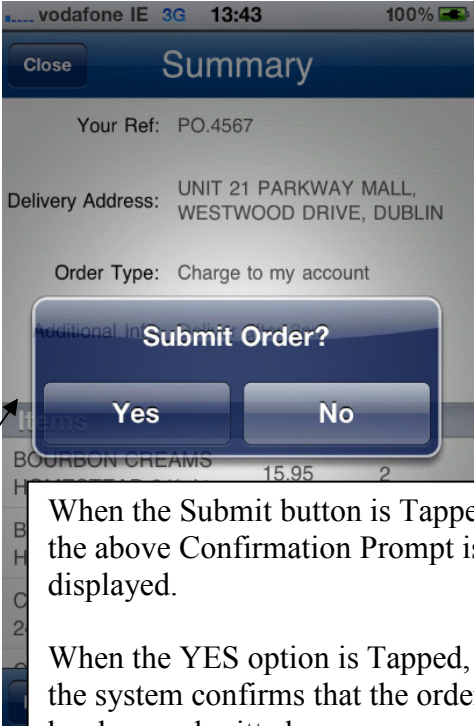
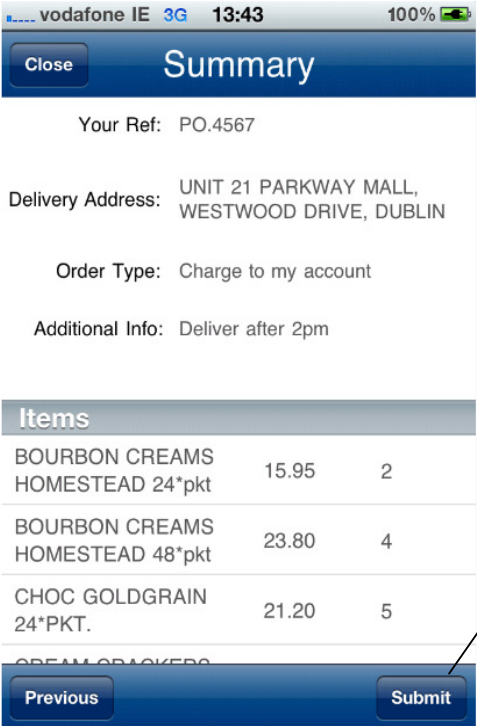
The Rep then enters the customers Purchase Order Reference and can amend the delivery address if required. Tap Next to proceed to the next stage.



The Delivery Method is now selected

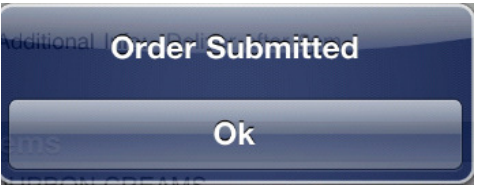


After confirming the Delivery Method, the Rep can then add Notes pertaining to the order. Tapping Next brings the Rep to a Summary screen – see next page.



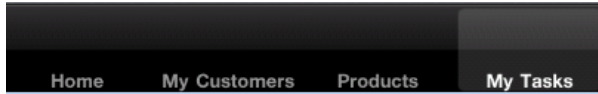
When the Submit button is Tapped, the above Confirmation Prompt is displayed.

When the YES option is Tapped, the system confirms that the order has been submitted.

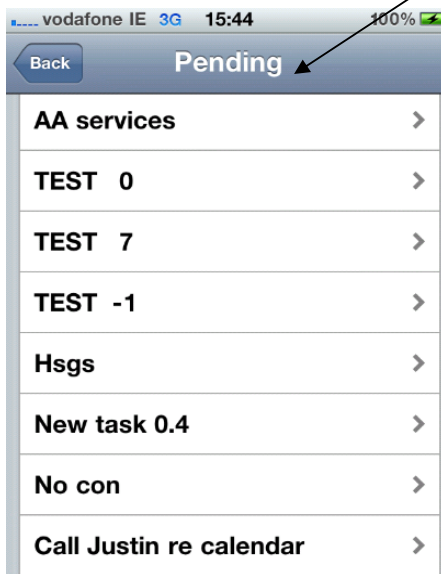
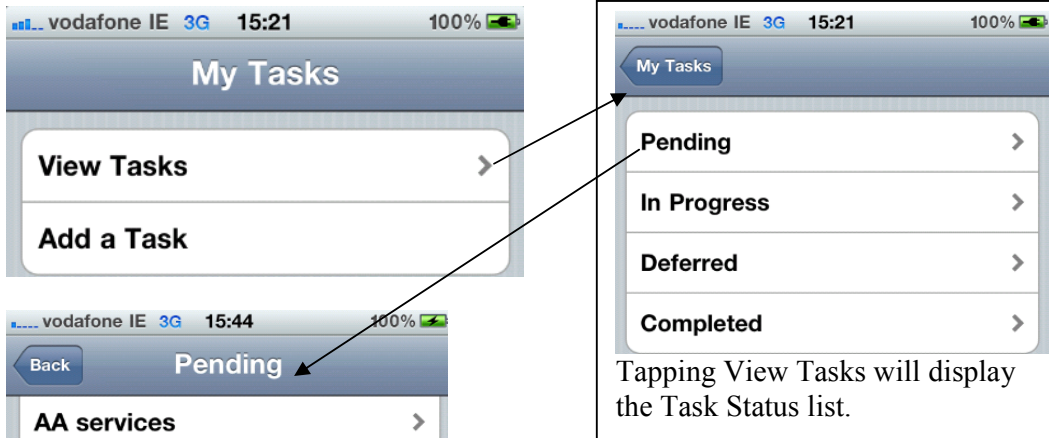


The process of creating a Quotation is exactly similar to creating a sales order.

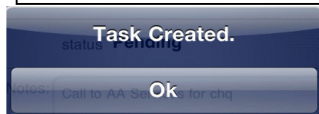
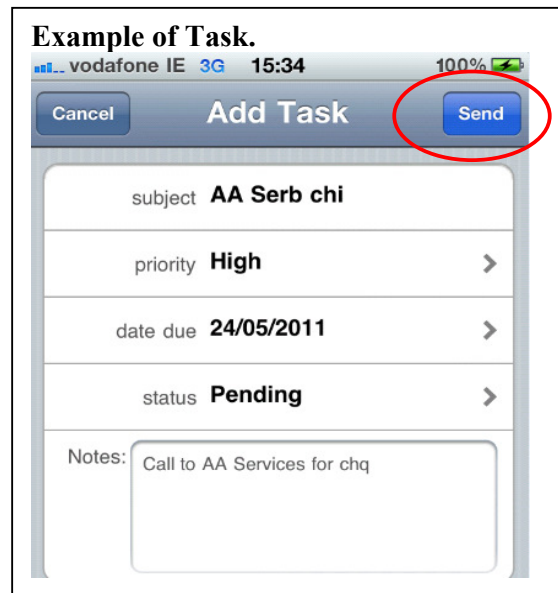
## 5. My Tasks



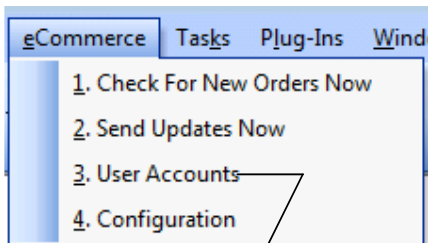
When My Tasks is tapped, the screen displays two self explanatory options:-



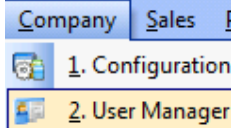
After entering the Task details, the Send button is Tapped & the system Confirms that the Task has been created.



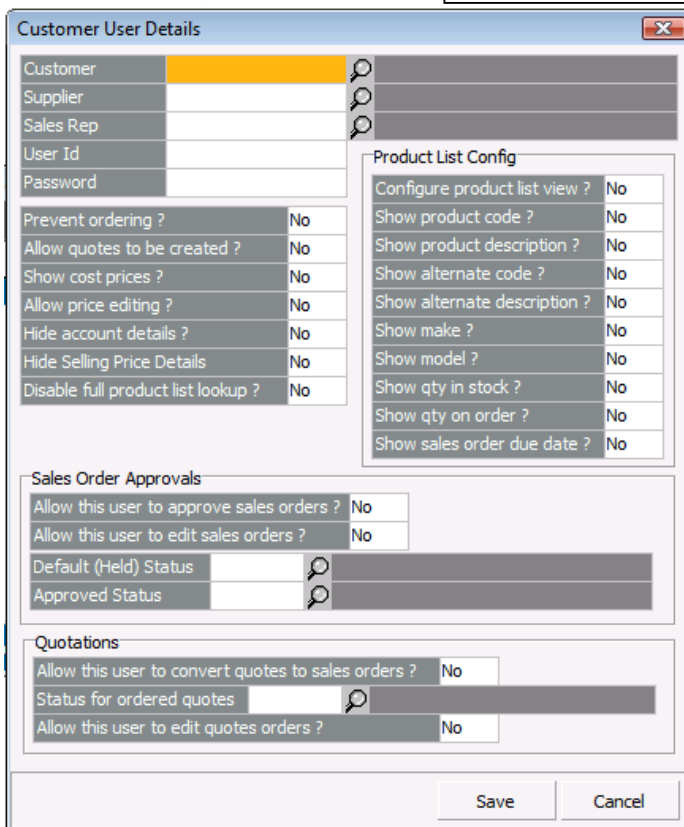
## Appendix 1 iPhone User Setup.



An iPhone Rep user must be setup in the eCommerce section of Intact as well the User Manager section.



**The User Id and Password must be the same in both sections.**



The Customer & Supplier Account codes must be blank.

The Rep Code can be selected from the drop down list of Reps already setup in the Company, Configuration section of Intact.

The Rep is confined to viewing only those customers that have his code as their Default Rep Code.

### **Super User Setup:**

If the Rep Code is also left blank, then the User Id has full access to ALL customers.

## Appendix 2 System Prerequisites.

Before the Intact iPhone application can be used, there are some prerequisites:

- The Intact SDK (Software Developers Toolkit) must be installed
- The Intact Web Portal Service must be installed.

The customer's hardware supplier / maintenance company will have to be involved in the setup process.

A static IP address is essential. The Port that the Portal Service will be running on needs to be open. The customer may have to do some "port forwarding" from the Router to the workstation that is running the Portal Service.

The files for installing the SDK are found in:-

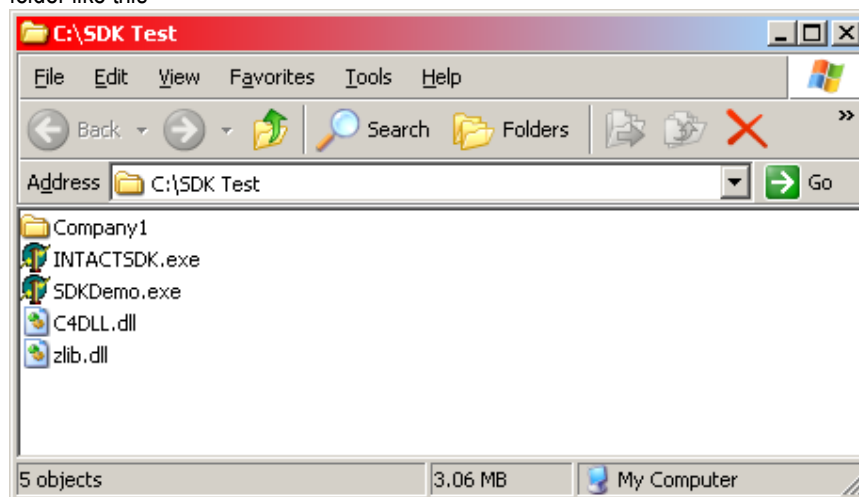
[www.intactsoftware.com/installs/sdk/sdk\\_2.zip](http://www.intactsoftware.com/installs/sdk/sdk_2.zip) (underscore between sdk and 2)

The files for installing the Portal Service are found in:-

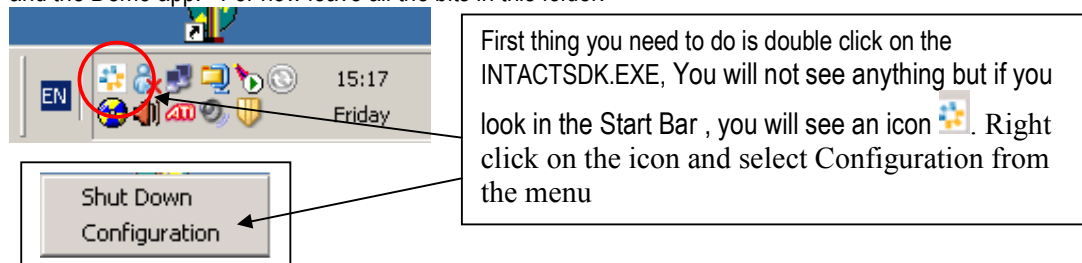
[www.intactsoftware.com/installs/portal/portalservice.zip](http://www.intactsoftware.com/installs/portal/portalservice.zip)

### AP2.1 Installing the SDK.

When you unzip the file from [www.intactsoftware.com/installs/sdk/sdk\\_2.zip](http://www.intactsoftware.com/installs/sdk/sdk_2.zip), you should get a folder like this

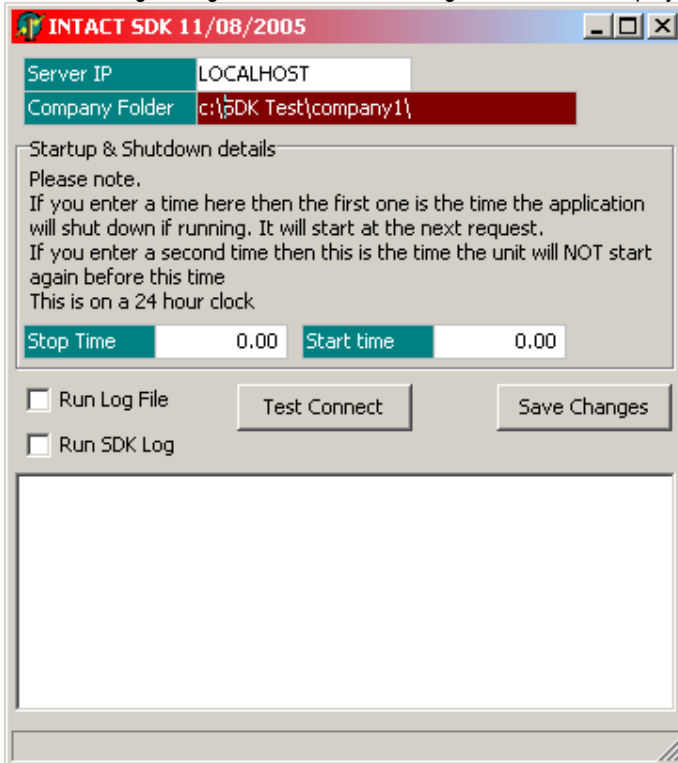


Please note the path to this folder "C:\SDK Test". You have all you need in this folder to run the SDK and the Demo app. For now leave all the bits in this folder.

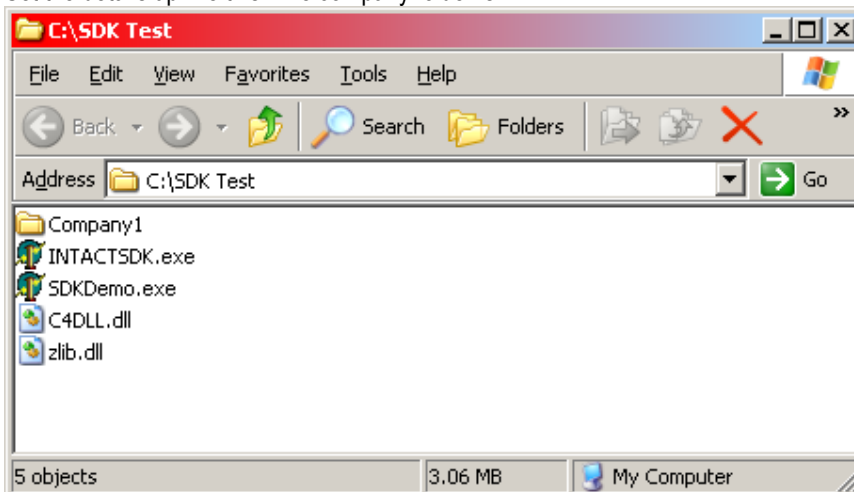


Please note you will need to repeat this running of the INTACTSDK.exe each time you get a new version of Intact. This is needed with a com server to register all the functions it implements with Windows.

After selecting Configuration, the SDK Configuration screen displays:



Set the details up like this. The company folder is



in this case. (It must be the path to the database)

The C4DLL.dll file included with the SDK is for standalone execution only. Standalone execution allows one connection to the database tables at any given time. This means Intact should not be running at the same time as the SDK. This is fine for development.

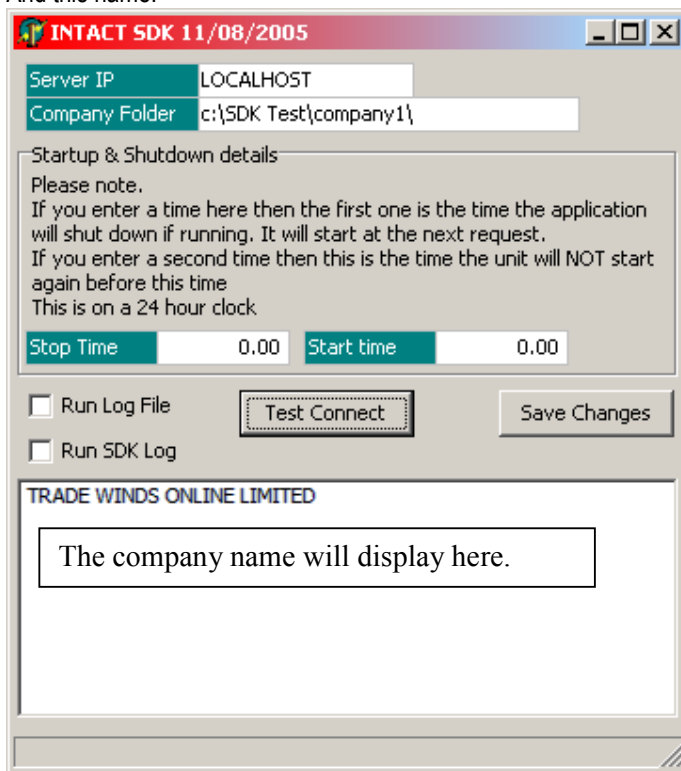
In a 'live' situation the C4DLL.dll for Codebase client/server needs to be used. This allows multiple connections to the database.



Click the Test Connect button:

You should get a "Success" confirmation as illustrated opposite.

And this name:

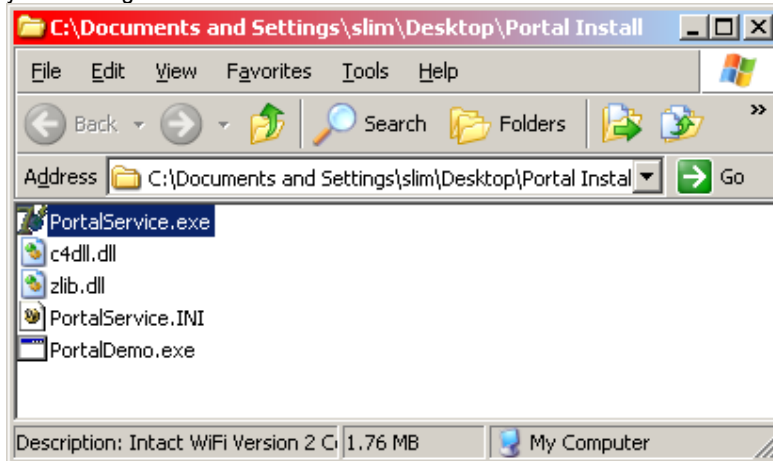


The SDK is now installed.

## AP2.2 Installing the Portal Service

Note: The SDK must be installed before installing the Portal Service.

When you unzip the file from [www.intactsoftware.com/installs/portal/portalservice.zip](http://www.intactsoftware.com/installs/portal/portalservice.zip) you should get a folder like this:-



If you edit the PortalService.INI file, you should see something like this:

```
CSPath=C:\intactwin\company1\
```

```
ServicePort=1024
```

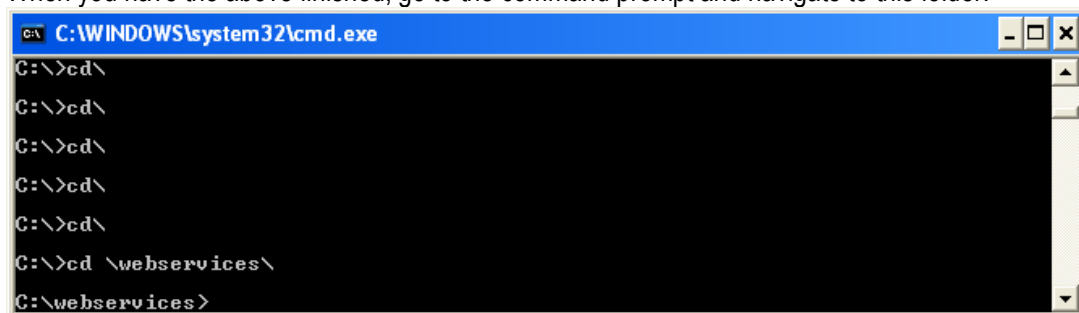
```
ServerID=192.168.34.234
```

```
UseLogFile=false
```

```
UseErrorLogFile=false
```

- The CSPath MUST be the place where the data is.
- Leave the Port number as it is.
- Change the ServerID to match the IP Address of the Server that is hosting the portal service.

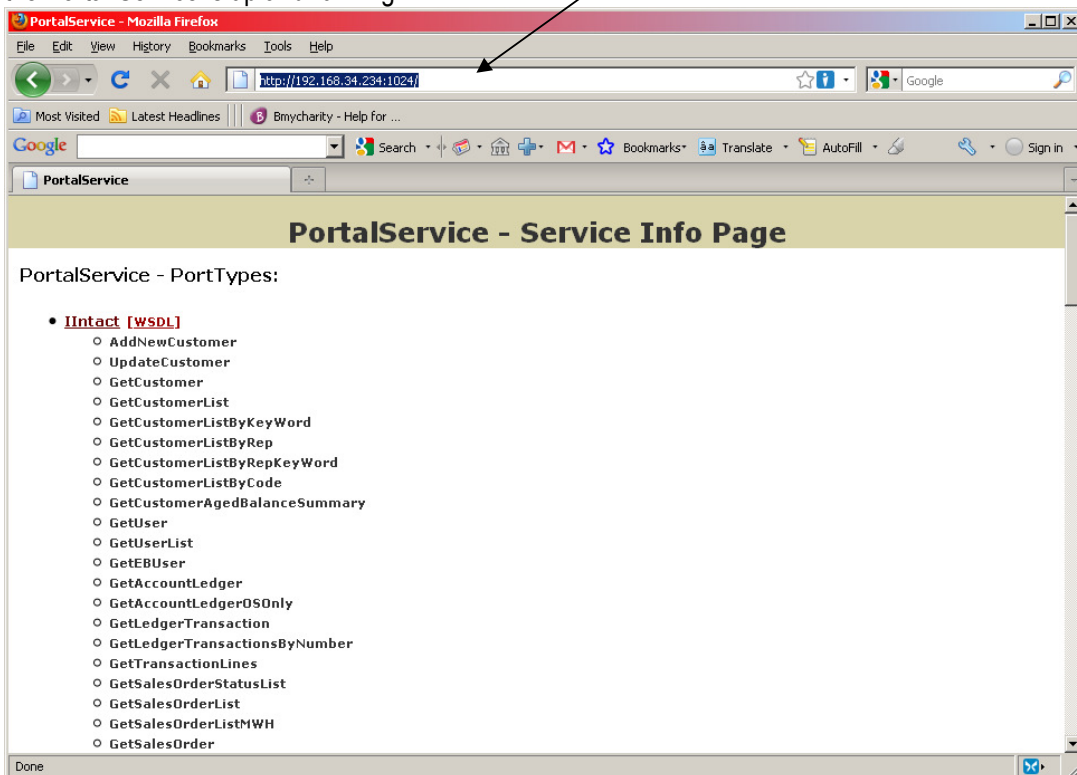
When you have the above finished, go to the command prompt and navigate to this folder.



```
C:\WINDOWS\system32\cmd.exe
C:\>cd\
C:\>cd\
C:\>cd\
C:\>cd\
C:\>cd\
C:\>cd\
C:\>cd\webservicess\
C:\webservicess>portalservice.exe /install
```

Then, type in PortalService.exe /install and press Return

To test the install, open your Web Browser. Enter the IP Address of the Server that has the Port that the Portal Service is running on, and press Return. If the following page is displayed, the Portal Service is up and running.



NB. A port in the Router will have to be opened and traffic on this Port forwarded to the machine that the Portal Service is running on.

**End of Tutorial**