Mobile Enterprise

Motorola - Mobile Handheld Sales User Guide

Version 2.0

DadePaper

Welcome to the Mobile Enterprise

This system supports casually connected line of business applications such as Mobile Handheld Sales. It has been designed to support applications that will work both online and offline so you can always access your data when you need it. This system is Dade Paper's proprietary technology.

Support Contact Information

If you are having any problems, please contact our support line or your local support contact.

Corporate Help Line: 305-889-3580

Local Support Rep.: ____

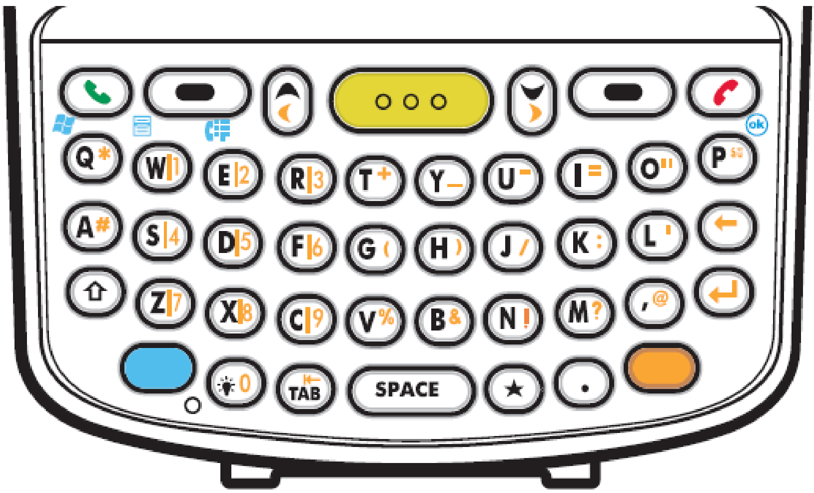
Device

The Motorola MC75 mobile handheld computer

Keyboard:

The device has a qwerty alpha keyboard. This keyboard requires that you use a number lock key when entering numbers.

The number lock key is the Orange Key on the keyboard. 
Use this key to access the secondary layer of characters and actions (shown on the keypad in orange).



Press the Orange key once to activate this mode temporarily, followed by another key. This displays the following icon at the bottom of the screen, until a second key is pressed: 

Press the Orange key twice to lock this mode. This displays the following icon at the bottom of the screen: 

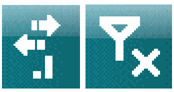
Press the Orange key a third time to unlock.

Networking:

The device has both an integrated cellular and a WiFi radios for communications.

Cellular Radio
The cellular radio operates without user intervention and makes network connection as needed by your software. The status of the cellular radio is indicated by an icon at the top of your device. This icon will change based on the status of your connection and the cellular networks availability.

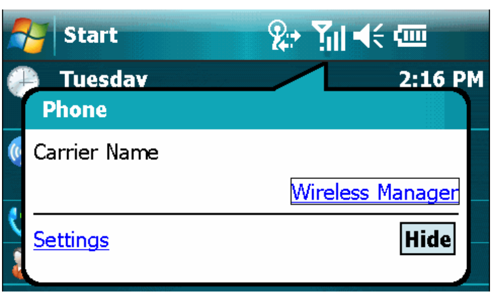
The number of bars indicates the strength of your signal



Additionally, these icons represent “network is active” or “network is unavailable”

WiFi
The WiFi radio must be setup with a profile for each WiFi network you wish to use. Also, The WFi radio must be powered on to be used. We suggest that unless using the WiFi radio you keep it powered off to save battery power of your device.

The power to the WiFi radio is controlled using the “Wireless Manager” application. This application can be launched by tapping on wireless status icons on the top of the screen.

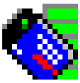


Then tapping the link “Wireless Manager”

This will launch the “Wireless Manager” where the WiFi radio can be turned on or off.

The WiFi radio status is indicated by an icon at the top of your device.

Joining WiFi Networks (WLAN Configuration)
On the home screen of your device there is a task tray icon on the bottom right of the screen for managing WLANS

 or similar

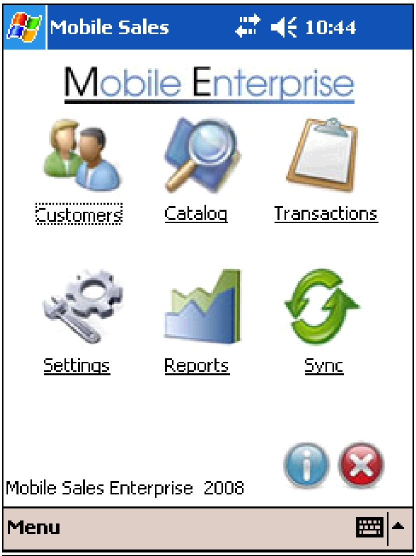
Tap on this icon to pop-up a menu list. From this list you can choose the top option “Find WLANs” in order to have the device scan for available networks.

From the list, tap and hold the network you want to join and choose “connect.” This will take you through the steps to create a profile for that network. You may need a password if the WLAN requires it. (Contact support for additional help configuring a WLAN)

Once the WLAN profile is setup you will be able to use your WiFi radio on that network.

Mobile Sales:

The Mobile Sales application can be started by tapping on the Start menu button and then tapping on the icon for Mobile Sales. This will launch the home screen where you can access each of the programs workflows.



Workflows

The application supports workflows for various tasks and information retrieved. In the following pages we will step through each of these workflows in greater detail.

Customers	Customer information
Catalog	Product information
Transactions	Orders, Invoices, and Quotes
Settings	For support use only!
Reports	Future use – various reports
Sync	Communication with PaperMaster

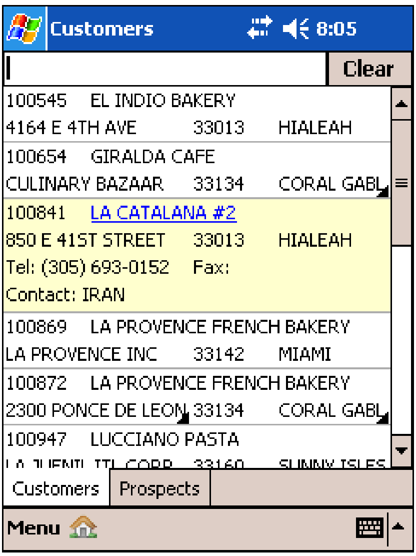
Exiting the application

To exit the application, tap on the exit icon located on the home screen. You can reach the home screen from all other screens by tapping on the home icon.

Customers Workflow

From the home page, tapping on the Customers icon will launch the customer workflow. From this workflow you can look up a customer account, view customer details, view AR balances, and view customer invoice headers with truck and stop information.

The main customer screen will list all of your assigned customers. Information available within the list includes: customer number, customer name, address, primary contact, and primary phone number.



Icons: The home icon will always return you to the home screen.

Note: The “Prospects” tab is for future use.

This list can be filtered by entering data into the text box found on the top of the screen, such as order number, customer number, or customer name. The list will automatically filter down as you type into the box. Tap the “clear” button to reset the list and to display all customers.

To select a customer you can scroll or use the keypad to highlight and expand the record.

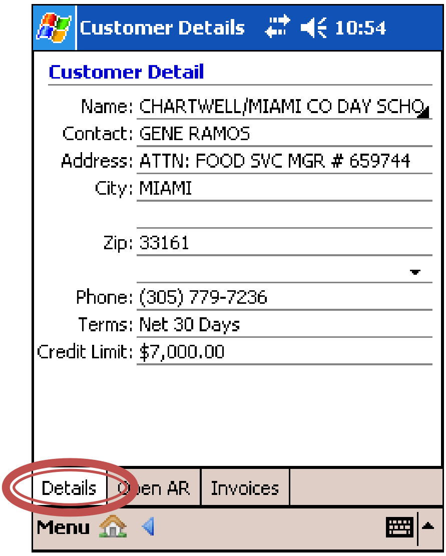
Tap on the customer name (in blue) to open customer details.

Note: Links are highlighted in **blue** within the application and can be tapped to drill into or to link to additional information.

Customers Details and AR

The “Customer Details” screen displays three tabs located across the bottom of the screen.

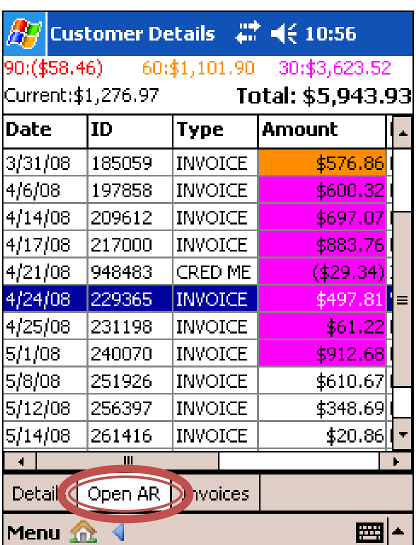
The default tab “**details**” will display basic customer information including terms and credit limit.



From the details tab you can view basic customer information including terms and credit limit. Note: this information is not editable.

Icons:
The left arrow icon will return you to the previous workflow screen.

The “**Open AR**” tab will display the customer’s account receivable.

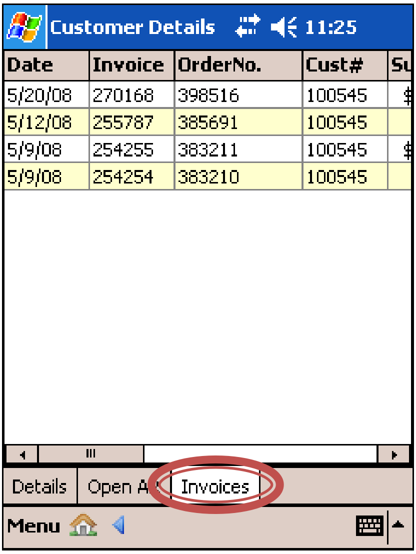


Totals are displayed across the top of the screen for the 90, 60, 30 and current buckets.

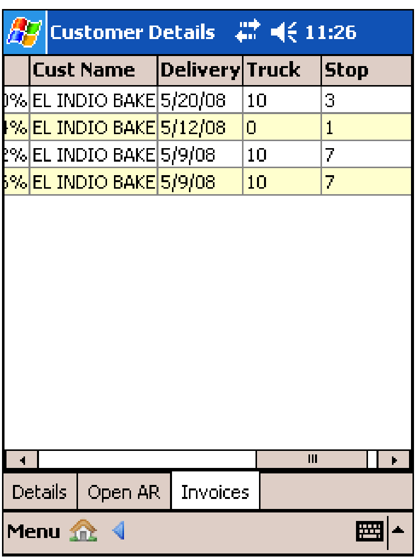
Scrolling the list to the right will display the transaction reference information.

Customers Invoice Summary

The **"Invoice"** tab will display the customer's invoice headers.



You can sort this and most other lists by tapping on the header fields. Tapping the same header again will reverse the sort.

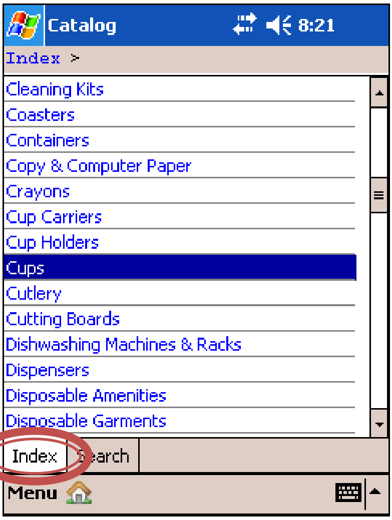


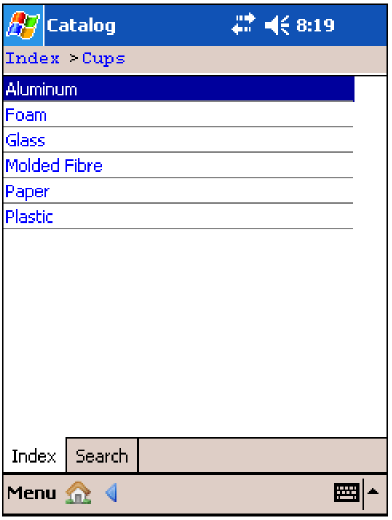
Scrolling the list to the right will display the invoice truck, stop, gross profit dollars, and gross profit percent information.

Catalog Workflow

From the home page, tapping on the Catalog icon will launch the catalog workflow. From this workflow, you can browse and search the product catalog. You can also look at item details and see item invoice history across all your customers.

The main catalog screen will display the product index tab.





The "**Search**" tab will display the product search screen. Searching can be used to look up products via the item number, description, manufacturer ID, manufacturer name, or UPC.

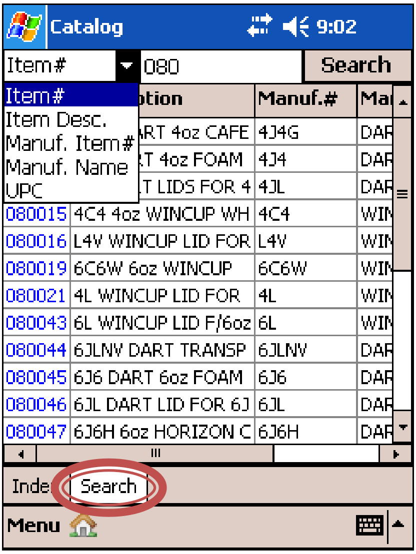
Icons:

The left arrow icon will take you to the parent index, i.e. back from Cups to Index on the screen shot above.

When searching by an item number, the search will look for items that start with the information you enter such as '080'. Search will display all items that begin with the data entered.

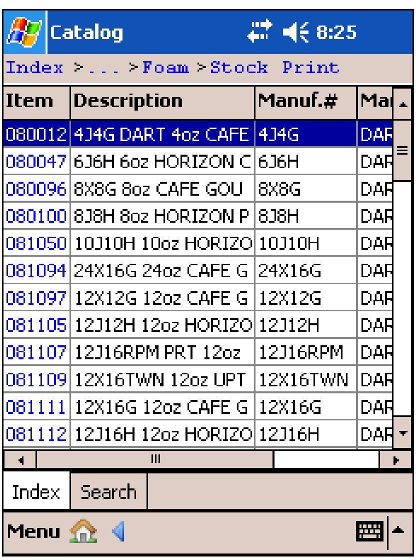
Items will be found faster if searched by complete item number rather than by partial number.

Catalog Workflow



Searching may take time. While the device is performing a search, the search button will **change** into a **cancel** button. This can be used to cancel an ongoing search operation.

A product listing page will be displayed when you have navigated to the lowest index node or completed a search. The list will display an item number, description, manufacturer ID, and manufacturer name.



You can use the breadcrumb at the top of the screen to navigate directly to a previous index node.

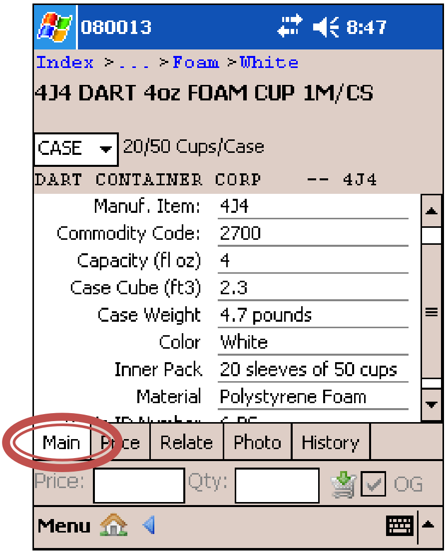
Index > . . . > Foam > Stock Print

This breadcrumb is also available within the item details.

From this screen you can tap on the item number (in **blue**) to open the item details.

Catalog Workflow - Item Detail

The item detail screen displays five tabs. The default tab “**Main**” will display the items basic information and attributes.



More information about the item detail screen is covered under the transaction workflow section below.

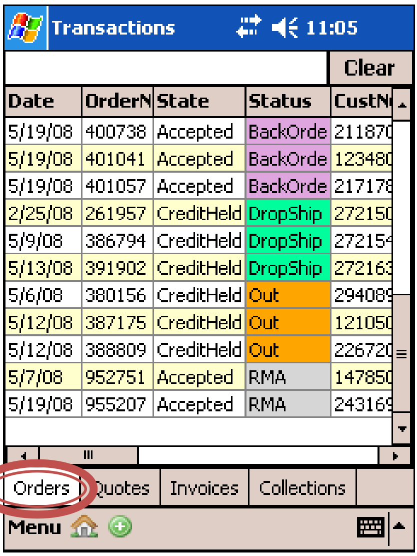
When accessing the item detail outside of an order or quote, the price bar will be disabled and Price or Quantity cannot be entered.

When accessing item detail directly from the catalog workflow, you are able to see the items history across all of you customers. This information is available under the “**History**” tab.

Transactions Workflow

From the home page, tapping on the Transactions icon will launch the transactions workflow. From this workflow you can manage your transactions, build new orders and quotes, and view invoice history.

The transactions screen defaults to the “**orders**” tab. This list will display all of your customers’ open orders including orders that were not placed via handheld. Orders displayed here are either locally stored on your device or on PaperMaster. This list will update after each synchronization*.



This list can be filtered by entering data into the text box on the top, such as order number, customer number or customer name. Tap the “clear” button to reset the list.

Scrolling the list to the right will display additional order information such as delivery date, sub-total, tax, total $, GP$, and GP%.

Tap on any header to sort this list. Tap again to reverse the sort.

Order state:
Each order is assigned an order state. Orders that you have created on the device but have not yet submitted will not have an order number and will have a state of “**Open**” or “**Committed**”.

When you synchronize, only “Committed” orders will be sent. “Open” orders will not be submitted to PaperMaster. “Open” orders must be “Committed” in order to be sent to PaperMaster. Committing orders will be covered under the section “Building an Order” below.

Once an order is submitted, its state will update to “**Sent**” or “**Sent Error**”. “Sent Error” state denotes a problem with the submission. In order to correct the “Sent Error” re-synchronize the device.

* Synchronization will be covered in a later chapter.

Transactions Workflow

Orders that have been processed by PaperMaster will be displayed with an order number and a state of either “**Accepted**” or “**Creditheld**”. As orders are removed from credit hold or placed onto credit hold, the state will be updated at each synchronization.

Order Status:
The system sets an order status to help you identify order types and order issues. These statuses are displayed in color code in the status field.

The possible order statuses are:

- BackOrder These are open backorders on PaperMaster
- DropShip These are drop ship orders
- Out Indicates that there was an out on the order
- Price Indicates that a submitted price was adjusted
- OutPrice Indicates both of the above
- RMA These are customer pickups
- Counter These are counter orders

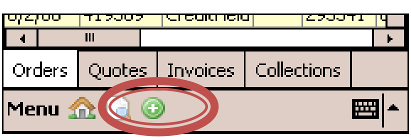
As orders are invoiced, they will be removed from orders tab and moved under the invoices tab. Orders tab displays only open orders.

Viewing an order

To view an order you need to select the order by tapping on it. Once the order is selected, a new icon will be displayed on the bottom of the screen. This icon is the view transaction icon . Tap this icon to open the order for viewing.

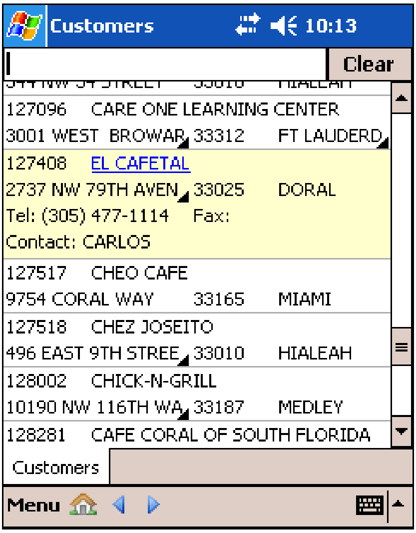
Building an Order

You can build an order from the Transactions Workflow. On the order tab within the transaction workflow screen, you can create a new order by tapping on the new icon .



This will launch the customer selection screen. Navigate to the desired customer and select the customer by tapping on the customer’s record. Remember, you can type in the customer name or number to quickly filter the customer list.

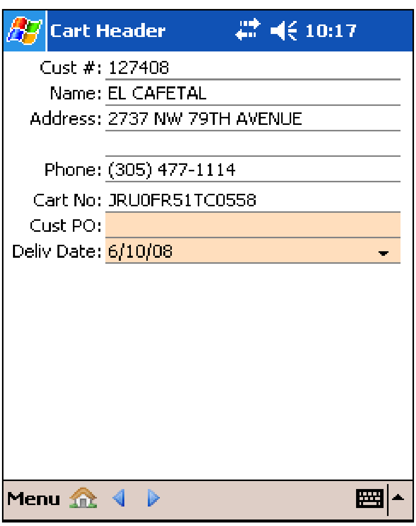
Building an Order



Icon:

The right arrow icon will advance the ordering workflow to the next screen, order header.

To navigate forward or back within the order, use blue arrows on the bottom of the screen. With the customer selected, tap the right arrow to advance to the order header screen.



You can enter a customer PO number here or at the end of the order build process.

Tap on the small down arrow to the right of Deliv Date to bring up a calendar or type in the delivery date directly.

Verify that this is the correct customer, enter the Customers PO Number and change the delivery date.

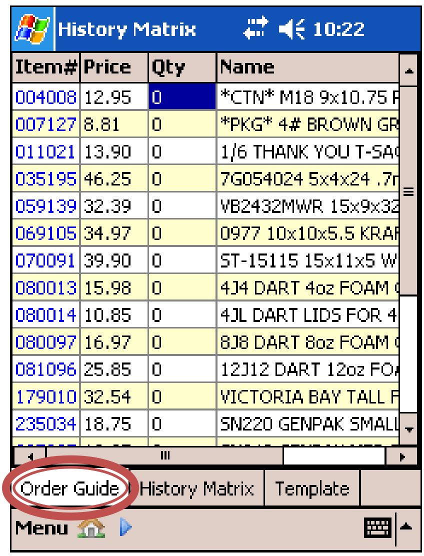
Tap right arrow to advance to the item picker screen.

Building an Order - Item Picker

The item picker allows for quickly building orders based on the customer's order guide or previous invoice history. There are two modes of operation: the order guide and the history matrix. The default tab is the "**Order Guide**".

Using the order guide, you can add the desired quantity directly into your order cart. The quantity entered will be copied into the order cart when you tap on the right arrow.

The order guide list is maintained within PaperMaster as a flag that is set in the 117 (Last Price) file.



The keypad can be used to directly enter the quantity and navigate up and down through the list of items.

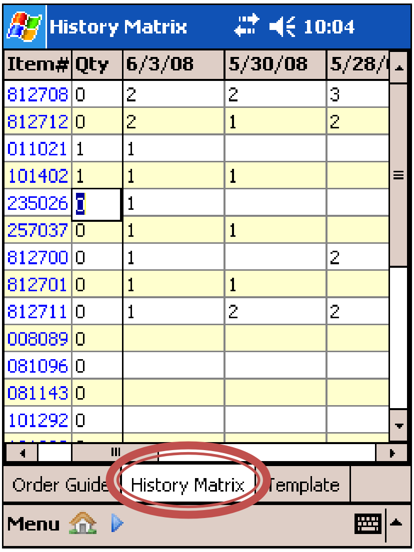
The item codes are a different color than the rest of the information, **blue**. That means you can tab on the item code to drill down into the item detail. This feature is available for anything displayed in **blue**.

Note: The "Template" tab is for future use.

The tab "**History Matrix**" will display all items purchased across the last ten invoices for the selected customer. In the same fashion as the order guide, quantity that you enter in "History Matrix" will be copied into the cart when you tap on the right arrow.

Each invoice is listed by date across the top, starting with the most recent. The numbers represent the purchased quantity of that item on that invoice. You can scroll to the right to view older invoices.

Building an Order- Item Picker

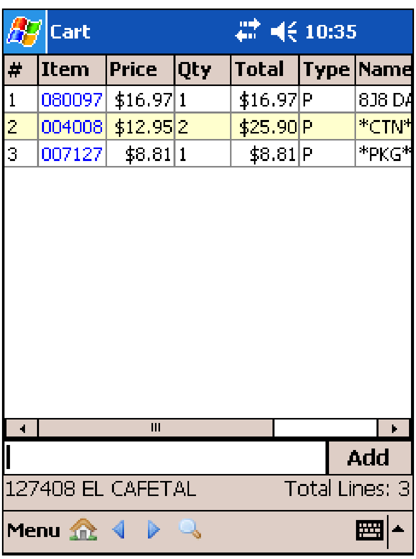


Tapping on the header (invoice date) will sort the list by that invoice's quantity.

Tapping the Item Number header will sort the list by item numbers. Tapping again will reverse the sort.

Scrolling the matrix to the right will display older invoices.

Tap right arrow to advance to the cart.



Icon:
The catalog icon will open the product catalog where you can browse and search for products to add to the order.

The text box at the bottom of the screen allows for directly entering an item by its item number or UPC code. If you enter an item already in the cart, its quantity will increment up by one.

The cart will display your order. It lists the order items, prices, quantity, item price types, item's order guide flag, and one-time price flag.

Building an Order

From the cart screen, you can launch the product catalog to browse or search for items, directly add items, or changed the quantity of items.

To change the quantity of an item, tap on the quantity next to the item. An edit box will open. You can enter the new quantity in the edit box.

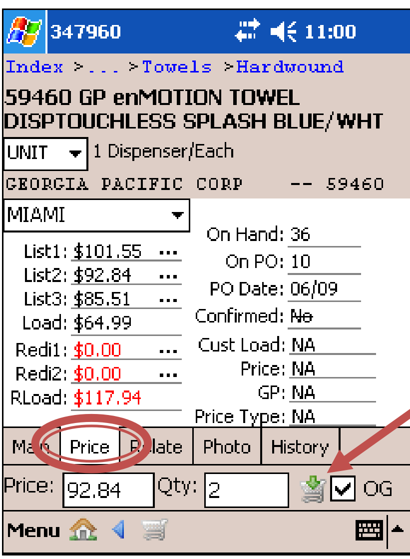
#	Item	Price	Qty	Total	Type	Name
1	080097	$16.97	1	16.97	P	8J8 DA
2	004008	$12.95	2	25.90	P	*CTN*
3	007127	$8.81	1	$8.81	P	*PKG*

Removing items from the cart

Setting item's quantity to zero will remove item from the cart. Using the same procedure as above, type in 0. The next time you leave the screen, the item will be removed.

Changing prices and getting detailed item information

From within the cart, you can tap on any item number (in **blue**) to open the item detail screen for that item. Tap the "**Price"** tab to get the item pricing information, inventory status, on PO, and PO confirmation status.



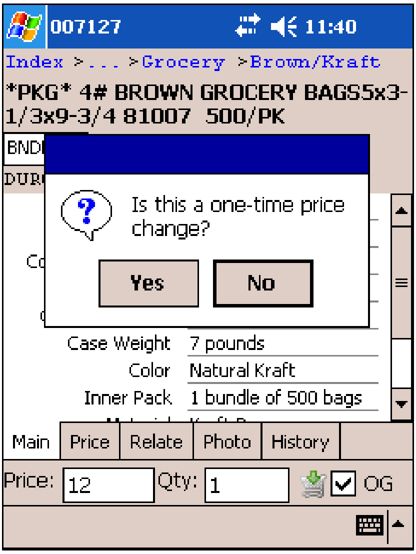
The On PO qty. displays the oldest PO available for that item within that WH. It will also indicate if the PO has a confirmed delivery appointment with the warehouse.

The price bar will indicate what is in the cart for this item. Here you can add the price, quantity, set the order guide flag, and update the cart using the update cart icon .

One time price

When a new price is set on the item that you are adding to the cart, the system will ask you if it is a one-time price change.

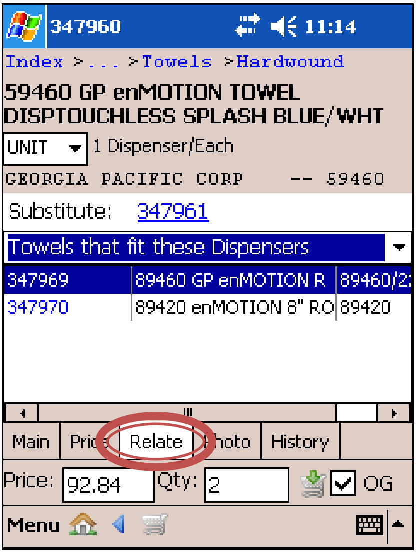
Building an Order



Answering yes will use this price for this order only.

Answering no will use the submitted price to update the customer's permanent fixed price.

The "**Related**" tab on item detail will display item relations such as substitutes and relationships from the dadepaper.com web catalog.



You can directly link to the item by tapping on the item number in blue.

From within an order or quote, the "**History**" tab will only display the history of the item for that customer.

Building an Order

The remaining tab “**Photo**” will display a photo of the item if it is available. We currently have over 9,800 product photos on the device.

Returning to the cart

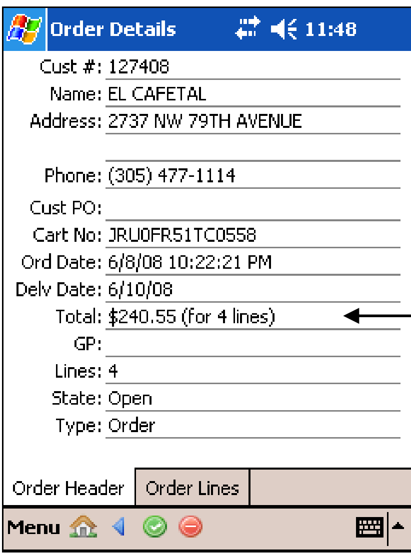
At any time you can return to the cart by tapping the cart icon.

Using the catalog to find items

From the cart, you can launch the catalog by tapping on the catalog icon. This will launch the catalog allowing you to browse and search for items. From item details you can add an item to your cart, adjust its price, set a one-time price, and manage its order guide flag.

Completing an order

To complete an order, tap on the right arrow from the cart screen to go to the transaction viewer.



It is possible that some items on the order do not have pricing. Items submitted without pricing will be system priced by PaperMaster.

The total $ will not be complete, as it excludes taxes, fuel surcharge, and any items that were not priced. Therefore, the total will indicate the number of lines used to calculate the total for the order.

From this screen you can

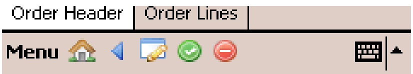
- **Return** to the cart
- **Commit** the order
- **Delete** the order

Note: The device will automatically save the order as “Open” while you enter items into the cart. This means that you can leave the order process at any time by hitting the home icon and return to it later without losing data.

Return to an order

You can return to an order from the transaction screen. You can edit the order if it has not been sent to PaperMaster. Select the order you wish to view. Once the order is selected, the order viewer icon will be displayed. Tap this icon to view the order.

If the order has not been sent, the viewer will display the edit icon.

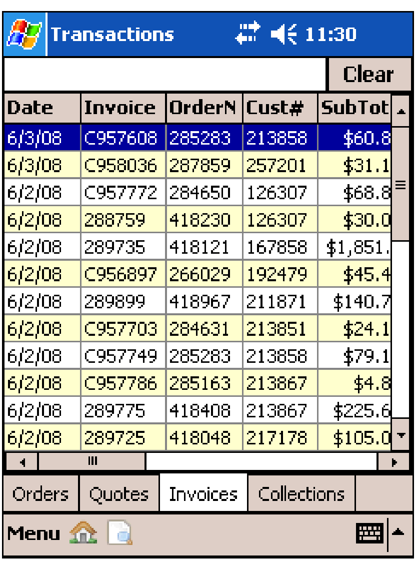


Tapping on the edit icon will begin the order workflow at the order header screen. You can now step through the order and make adjustments.

Note: If you edit an order that was previously "Committed", the status of the order will be reset to "Open". You will have to re-commit the order to submit it upon your next synchronization.

Viewing Invoices and Credit Memos

You can view past customer invoices and credit memos from the transaction screen by tapping on the "Invoices" tab. The list will display the available customer invoice and credit memo headers. The header will display the basic information as well as the invoice totals, profits, and truck-stop.



Credit Memos are easily identified by a "C" that prefixes the credit memo number.

When a transaction is selected, the viewer icon will be displayed. Tap this icon to view the transaction details.

Details will display complete invoice information including GP by line.

Reports

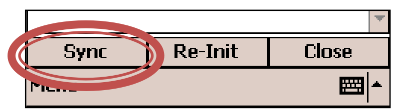
The reports section is for future use. This is where reports will be available to you. Please contact us and give us your ideas and suggestions for what you would like to see here.

Syncing Mobile Sales

From the home page, tapping on the Sync icon will launch the synchronization workflow. From this workflow you can submit your committed orders and retrieve updated information from PaperMaster.

Performing regular synchronizations will allow you to receive updated order statuses, customer AR, inventory, pricing, etc… throughout the day.

From the synchronization screen tap on the “Sync” button.



Note: The device should not need to be re-initialized under normal circumstances. Please do not Re-init unless support specifically directs you to do so.

Tips and tricks

General

- You can resize most columns within the application based on your preference. Tap and hold the line between two column headings and drag the column to the desired width. The next time you open that screen, the columns will remember the preferred size. This takes a little practice.

Pricing Breakdown

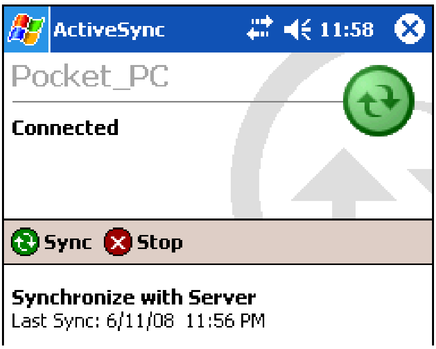
- The device is currently populated with 120 days of pricing
- All items on customers’ order guides are priced
- You can change all prices that are not known to be on a contract
- PaperMaster will override pricing requested if the item is on a contract for the customer
- Items submitted with no price will be system priced (Matrix) by PaperMaster

Pocket Outlook

Pocket Outlook 2003 provides email, contacts, and calendar functionality on your device. This application will synchronize directly with our corporate Exchange server. This means that your device will be in sync with the web mail system (mail.dadepaper.com).

ActiveSync

The ActiveSync application will sync email, contacts, and calendar together at one time. Open ActiveSync by tapping on Start and then tapping on ActiveSync.



To start the synchronization, tap on the Sync button. When synchronization is finished, you can exit the application by tapping on the button at the upper right corner of the screen.

Inbox (email)

The Inbox application allows you to read and send email from you device using you dadepaper.com email account. Open Inbox by tapping on Start and then tapping on Inbox.

There are lots of features to the Inbox application. Feel free to explore this application to learn more or contact support for additional information.

Email attachments

The device supports several types of attachments, such as Word, Excel, and image files. Attachments are not received automatically. You have to mark an attachment to be downloaded from within the email message. To mark, tap the attachment. An arrow icon next to the attachment will turn green. The attachment will be downloaded the next time you synchronize. Return to the message and tap on the attachment to open.

Inbox

The main Inbox screen will display your messages.

You can switch the view between folders Inbox, Outbox, Sent, etc… by tapping on the current folder name with the small down arrow next to it.

Tap a message to open it.

Tap and hold the pointer to open an option box that will display other actions you can perform on the message.

Messages in your Inbox can be synchronized directly from this screen by using the Send and receive button. Tap this button to force the device to send an email you created and to get new mail.

Contacts

The Contacts application allows you to view and create contacts that are synced with you dadepaper.com email account. Open Contacts by tapping on Start and then tapping on Contacts. These contacts are also available within your Inbox application.

Calendar

The Contacts application allows you to view and create appointments that are synced with you dadepaper.com email account. Open Contacts by tapping on Start and then tapping on Calendar.

In Calendar you can create meetings and send invite to anyone in your Contact list. Do this by adding attendants to the appointment. The Calendar also allows you to set up reoccurring appointments and reminders. These options are all within the new appointment creation screen, just tap new.