ESService Daily processes & use cases

Entersoft Business Suite® | Entersoft CRM® | Entersoft Mobile Suite®

Use & Configuration guide

Identity

Document version	2.0
Software version	3.2 iOS
Last update	July 2018

Copyright

Regarding the present content …

- It may be altered at any time.
- It serves exclusively informative goals.
- No guarantee whatsoever is handed out for the possible existence of mistakes or the wrongful use or non-wanted results produced by the use of processes hereby followed and recommended.

Contents

Introduction

The purpose of this manual is to provide basic information regarding the **use & configuration** of Entersoft Mobile Service application (ESService). In brief, the individual objectives are:

- The familiarization of the user with the ESService work environment
- The provision of useful information, regarding fundamental daily tasks, to the ESService user
- The guidance of the system administrator in configuration issues of the Entersoft Business Suite (EBS) application that are related directly with the operation of the ESService application

The Prerequisites for the use of the ESService application and of this manual are:

- the knowledge of all necessary **setup & adjustment** actions for IIS & Application server (Entersoft Business Suite version **4.10.0.0** or later)
- the knowledge of the **environment** & **usage** of each mobile device
- the right setting of all **required equipment**

Symbols in use


Entersoft Business Suite application


A connection with back-office is required

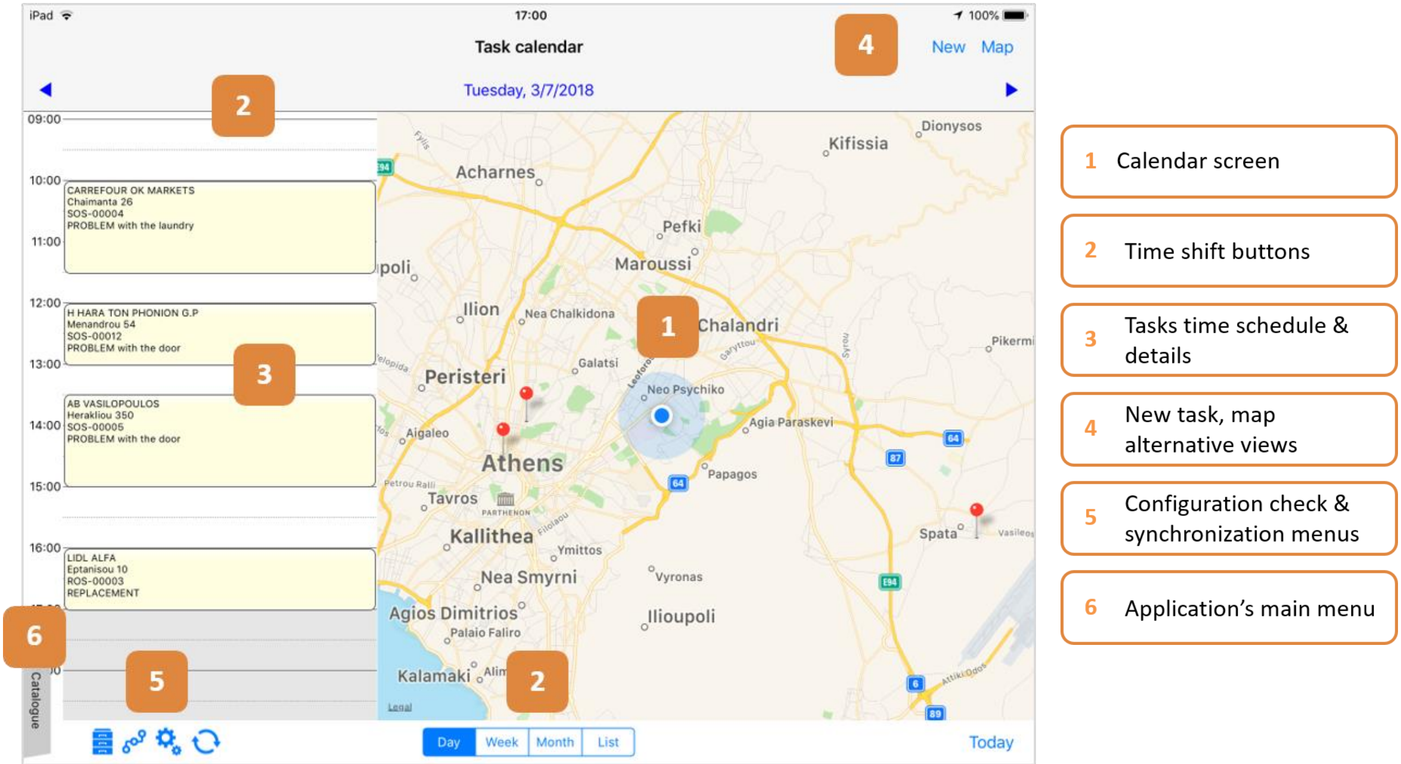

An Internet connection is required

Work environment

This section refers to the main elements of the ESMobile application work environment. Firstly, a short description of the main **workplace** is given, while later on the common characteristics of **display & investigation screens** are provided.

Calendar

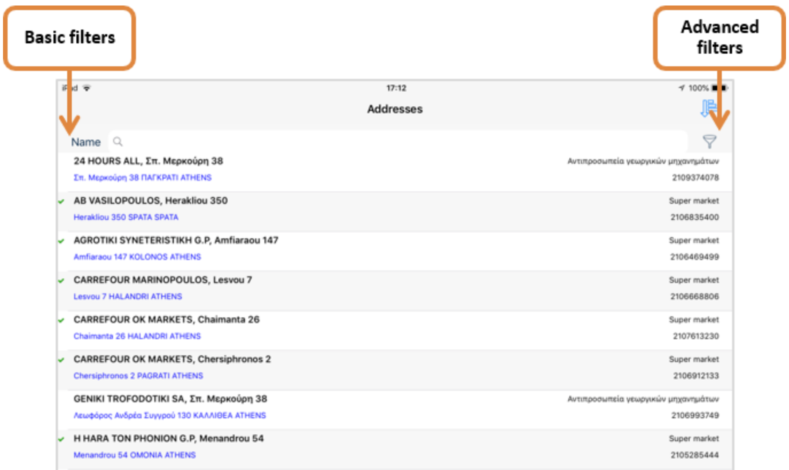
When entering the ESMobile application, the workspace is automatically occupied by a calendar screen where the scheduled tasks are shown in the form of list or tags but also as points on the map. Firstly, the tasks of the current date appear though, through the keys "Week" & "Month", the option of viewing the current week-month activities is given respectively. Pressing button "Today", results to direct return to current date. From the calendar screen, via the main menu, the navigation to other application screens is carried out.



Investigation screen

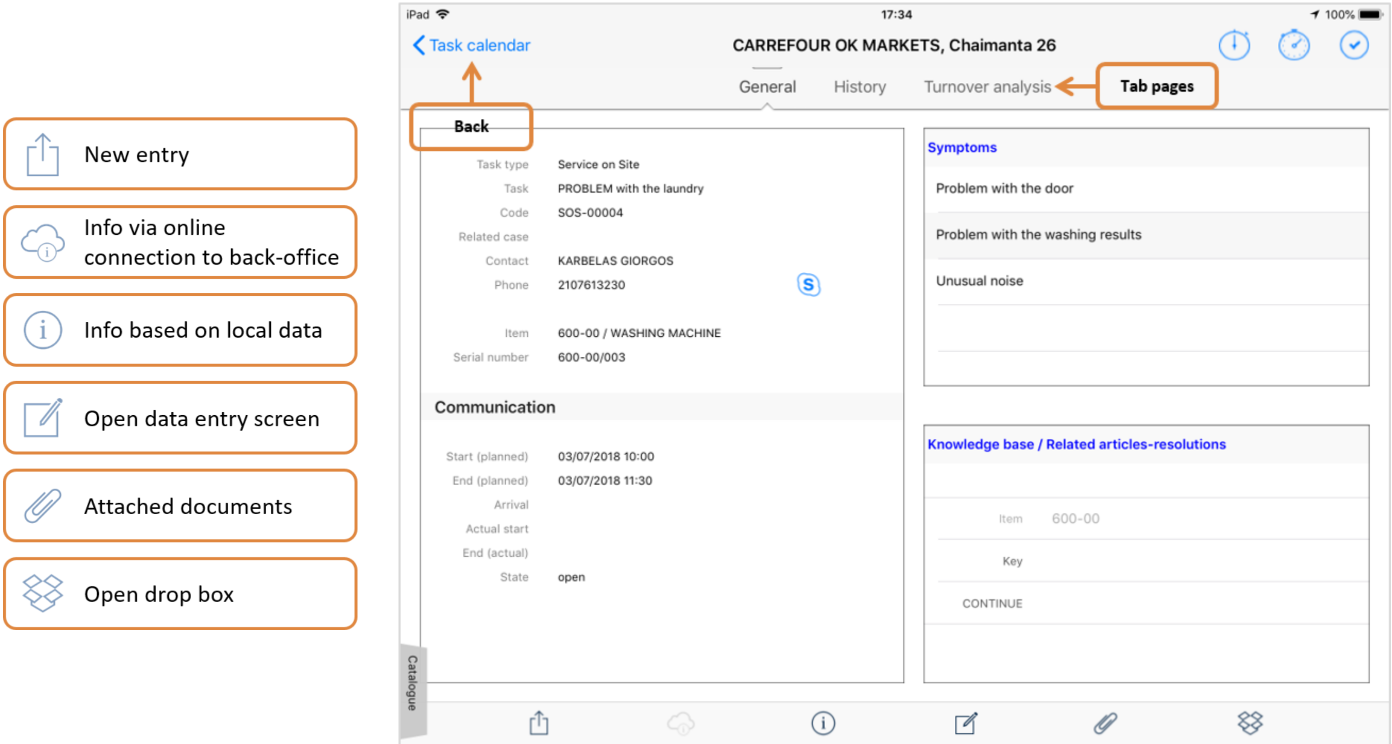
The investigation screens show the entries of an entity in the form of a list. The upper part of the screen is occupied by the area where the main & additional search-filtering criteria are defined (search panel).

When focusing on a list entry the transition to the dashboard or data entry screen, of the specific entry, occurs.



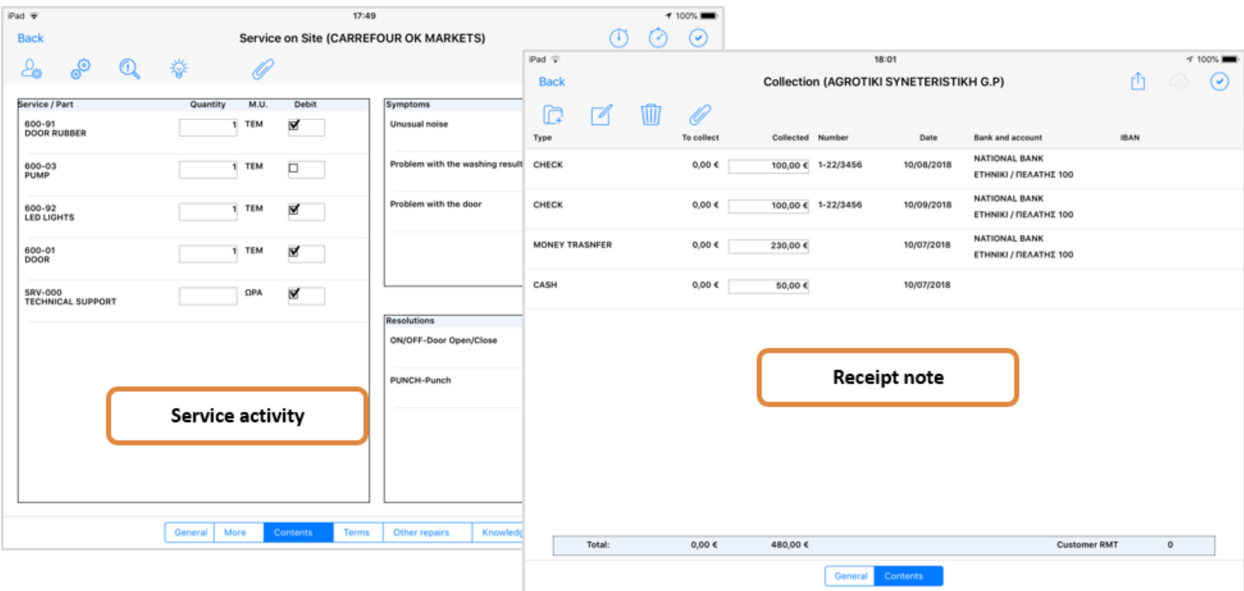
Dashboard screen

A dashboard screen enables the ergonomic display of information and actions available for the selected entry. It can show data from the current entry but also from other, connected to current, entities. Data are displayed for information purposes only, meaning that they cannot be edited by the user. The upper area of the screen displays the individual tab pages and the back button. At the lower part of the screen, the buttons for several execution actions are available.



Data entry screen

Data entry screens are used for editing or reviewing the data of a specific entry. The user interface of data entry screens differs depending on the entity it may concern.

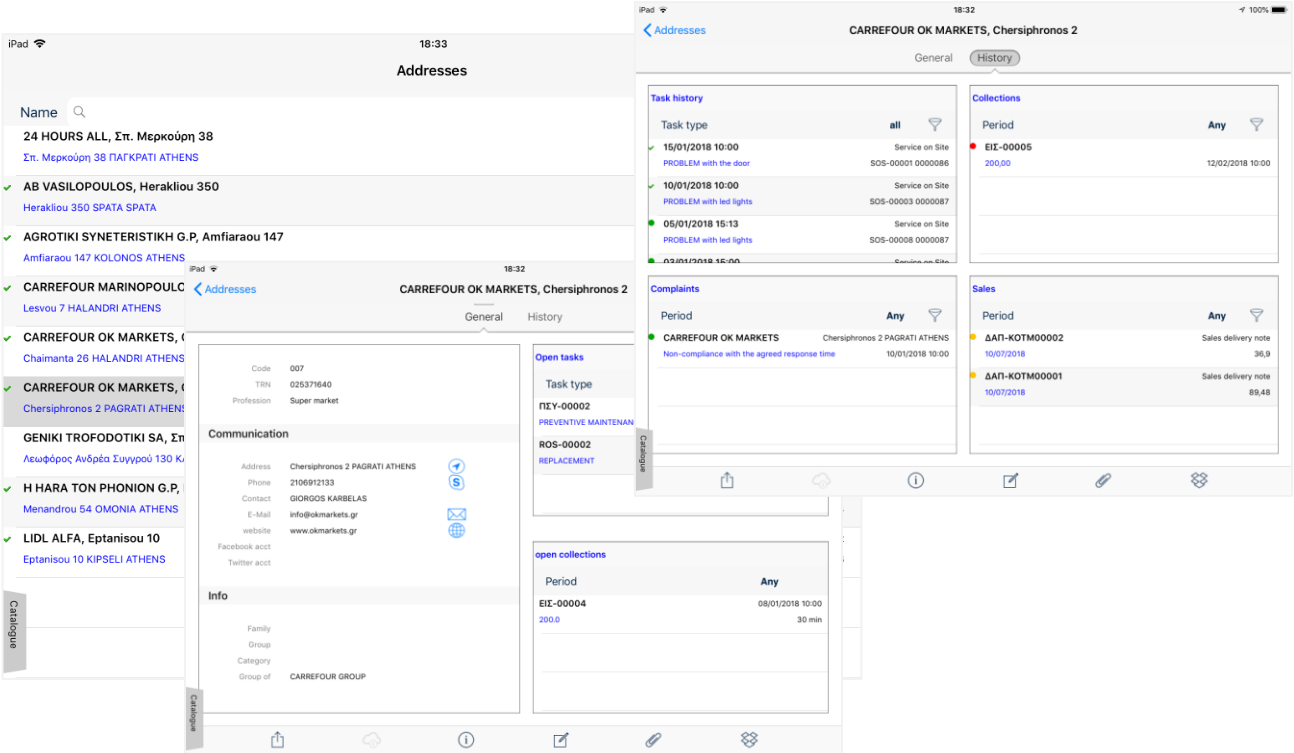


Main entities

In this section the main entities are described, meaning the **persons** (customers & contacts) and the **items** that are necessary for the execution of the ESService application several processes. Note that, the full administration of the main entities takes place in back-office and any data changes, form the mobile user, is prohibited.

Persons & Contacts

Access to the customers list is provided via the main menu entries **Persons** or **Address**. By selecting these entries, the complete persons list appears, ordered alphabetically by name. The search of a specific person can be conducted either by using his name or by using other identification data (telephone, address, profession, etc.) while to distinguish persons who are already **company's customers**, a specific color marking is used (✔Customer). When focusing on a specific person, further **information** (identification data, pending activities etc.) is provided, while at the same time, the option for direct **execution** of several **actions** (e.g. add new task) is given. Finally, via buttons "Attachments" & "Dropbox", the ability to display the **attached documents** screen & go to **Dropbox** is respectively given.



Access to the **Contacts** list is provided via the relevant entry of the main menu. By selecting this entry, the complete contact persons list appears, ordered alphabetically by name. When focusing on a specific contact person, the options of using alternative **correspondence** methods (e.g. via email) or getting further **information** (e.g. related persons) are provided.

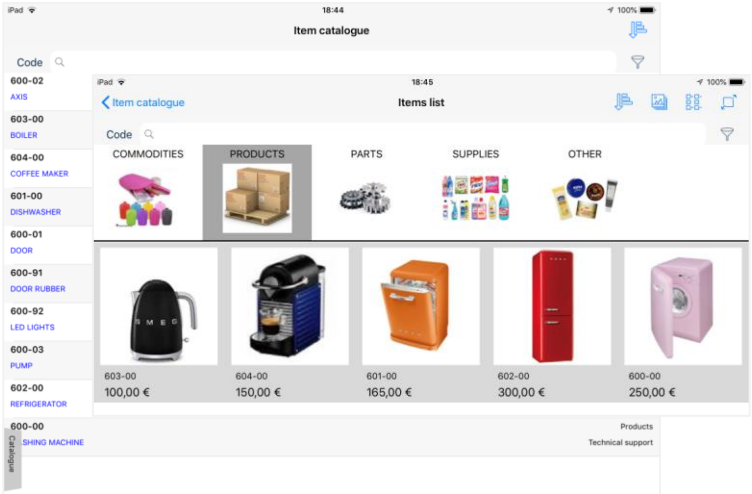
Through the entry "New" of the main menu, the ability to add a **new person** or **contact** is provided. To add a new person, the completion of the "name" is compulsory, whilst for the insert of a new contact the completion of the "related" company is also compulsory.

Note that…

- Based on the default configuration, available to the device are the persons-address that have **scheduled activities** assigned to the mobile resource-user.
- For further information regarding **person entity configuration**, see section EBS application's configuration/ Main entities/ Customers list.

Items catalogue

Access to the **Items catalogue** is provided via the relevant entry of the main menu. By selecting this entry, the complete list of items appears, ordered alphabetically by item's description. The search of a specific item can be conducted either by using its code or by using other identification data (description, manufacturer, grouping factors, etc.). When focusing on a specific item, the option of getting further information regarding either its additional **characteristics** (technical specifications, measurement units, etc.) or its **stock availability** is provided. Furthermore, information regarding **item's transaction data** (serial numbers, transactions history etc.) is provided -via an online connection to the server- through the various options of button "Online". Finally, via buttons "Attachments" & "Dropbox", the ability to display the **attached documents** screen & go to **Dropbox** is respectively given.



Furthermore, through the menu entry **Items presentation**, the option of presenting inventory items in form of a **photo-gallery** is provided. By selecting this entry, the complete list of items appears, thought by focusing on a specific grouping factor, the catalogue adjusts accordingly. Finally, focusing on a specific item, a screen with further information, related to the focused item, appears.

Note that...

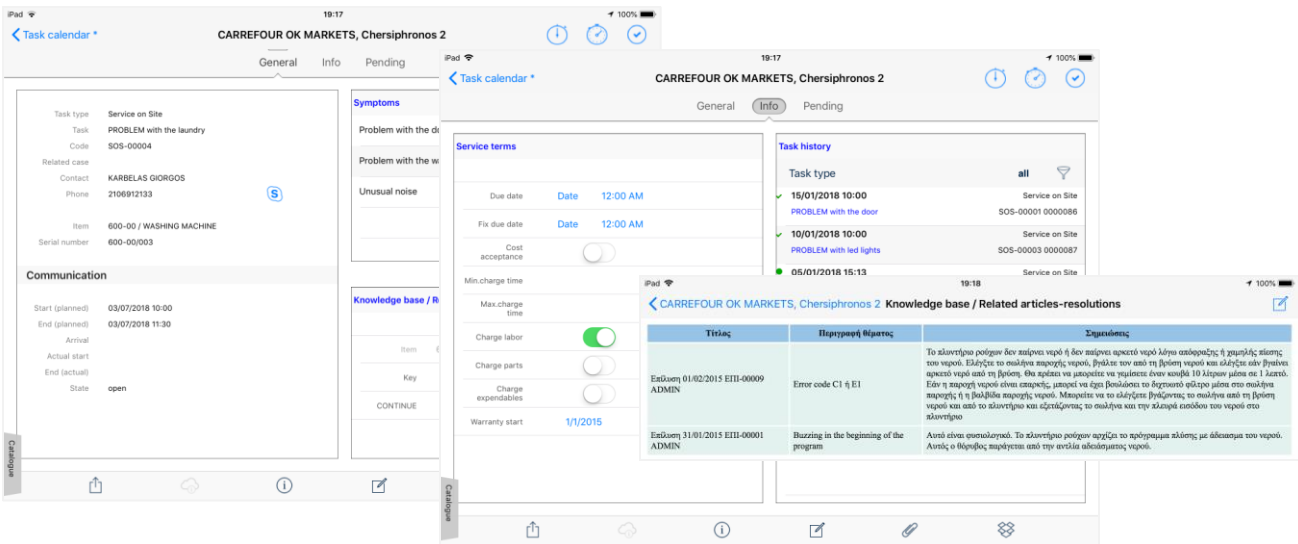
- Based on the default configuration, items available to the device are those that both their grouping factors and the items themselves are characterized as **available on mobiles**.
- Through the entry "**Photos receipt**" of the "Sync" menu, the option of downloading -via an online connection to the server- items image files, is provided.
- For further information regarding **item entity configuration**, see section EBS application's configuration/ Main entities/ Items & Services.

Service activities

In this section, the ESService actions related to the **technical support on site** (repair operations, replacement & preventive maintenance) are described. The several actions are usually performed form calendar screen while the mobile user has also the ability to perform them from person or address screens.

Calendar

The calendar screen displays all **scheduled,** in back-office, **service activities** giving at the same time the ability to the mobile user to add new **ad hoc activities** (button: "New"). Firstly, the activities of the current date appear though, through the keys "Week" & "Month", the option of viewing the current week-month activities is given respectively. Pressing button "Today", results to direct return to current date. When focusing on a specific activity, all information required for **performing** the service activity is given (item & serial number, symptoms, service terms and tasks history) while at the same time, the transition to company's **knowledge base** -via an online connection to the server- for searches on related articles & solutions, is provided. Furthermore, via button "View", the task's data entry screen appears, though via button "Actions" the option for direct **execution** of several **actions** is given. Finally, via buttons "Attachments" & "Dropbox", the ability to display the **attached documents** screen & go to **Dropbox** is respectively given.



Note that…

- Based on the default configuration, available to the device are all service activities referring to the mobile user as the **assigned to resource**. Also available to the device, only **for informative reasons**, are all closed activities related to mobile user's customers list regardless the "assigned to" resource. No matter the case, in order a service activity to be available to the device, its relation to a specific **service term** is a prerequisite.
- Based on the default configuration, available to calendar screen are only **open** activities. Differentiation of this setting is provided by setting the mobile parameter "Calendar_show_closed_tasks" to 1-Yes.

Activity processing

Through buttons "Arrival" and "Start" of calendar dashboard screen, the update of current task's **arrival and start date-time** is performed and its timing begins. Furthermore, to ensure the time-place accuracy of the activity processing, the user's position recording is activated.

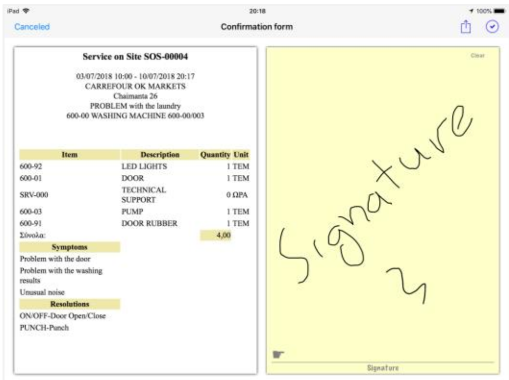
By pressing button "View" of the dashboard screen, the current task's data entry screen appears. In pages "General", "Other" & "Terms" task's **basic data** (person & address, item & series number, time & service terms) are provided, page "Other repairs" displays **historical tasks** referring to the selected item & serial number, while page "Knowledge base" gives access -via an online connection to the server- to several **related articles & solutions**.

From the "Contents" page and by using the relevant buttons, the **detailed recording** of task's "Services", "Spare parts", "Symptoms" and "Solutions" is performed. Note that, the service or a spare part characterization as "Debit" is automatically set based on the agreed service terms. while the ability to be modified by the mobile user is also provided. Through the "Attachments" button, the ability to **attach image-sound files** is given.

Finally, when task details data entry is completed, pressing button "Close" results to the **saving** of the task and in parallel, if selected, to the changing of its status as completed. At this stage, if the "Save and Close" or "Save and Cancel" is selected, the task's timing ends automatically, and the **end date-time** gets updated.

Service note issuing

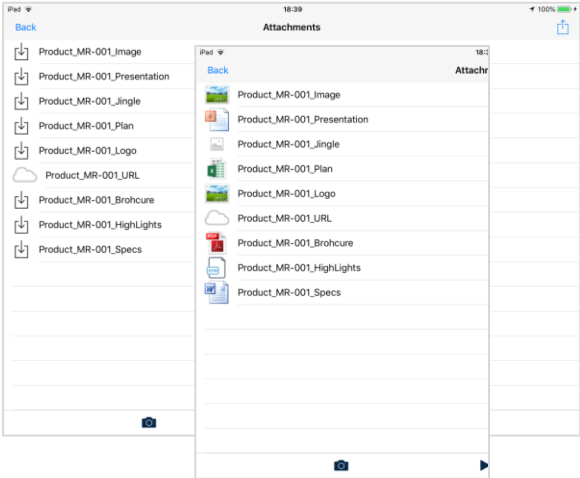
The service note is a screen where the simultaneous **confirmation & signing** of the current service activity takes place. When saving the task, and if the functionality of signature attachment is activated, the signature screen appears. Through the options of "Actions" button, the ability either to print the service note or send it via e-mail is given while, by pressing button "Close", the customer's signature is automatically added to task attachments.



Attached documents

From the attached documents management screen, the ability of **downloading** attachments from back-office, of **attaching** files on the device and of **previewing** the contents of an attachment from the device is provided. The attached documents functionality is available for the entities: Item, Person, Task, Document & Expense list.

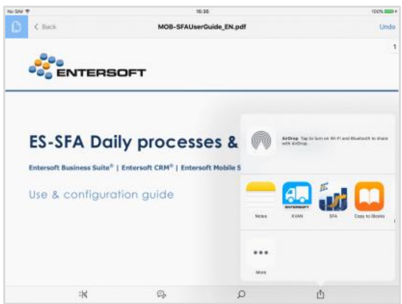
Attachments downloading



Access to the full, regardless entity, attached documents list is provided via the relevant option of "Sync" menu. Furthermore, through button "Attachments" of entity's dashboard screen e.g. entity Item), the list of all attached documents related to the current record is given. Pressing the "Actions" button of the attached documents screen, regardless the menu option used to activate the screen, the attachments from back-office downloading process is activated. When the downloading process is completed, the icon marking the documents to be downloaded (icon) is automatically replaced with an icon related to the type of each document. The icons used to indicate the various document types are:

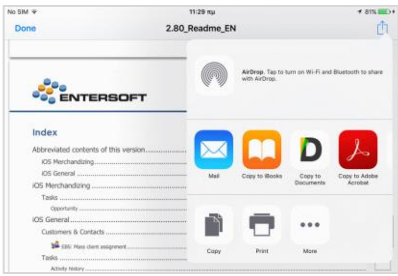
DOC	PDF	WAV
XLS	HTML	Other
PPT	JPG or PNG	Not stored (e.g. URL address)

File attaching



Using the or buttons on the attached documents screen, the ability to attach **image** or **sound** files is given. Alternatively, the ability to attach a file through the context of another application is also provided. In this case, we activate at first the preferable application (e.g. Acrobat application), we focus on the document to be attached and select the option "Open in…" of "Actions" button. Then, by selecting the ESMobile application's representative icon, a list with the available in ESMobile application entities is displayed. Finally, by focusing on a specific entity, a list of its detailed records is displayed from which we select the record to be related with the attachment file.

Attachment previewing



By focusing on a specific record of the attached documents management screen, a preview screen, relevant to the document's type appears. By pressing the "Actions" button of this screen, the ability either to send the document via e-mail or to preview it through the context of another application (e.g. Acrobat application), is provided.

Next appointment

Through the entry "Next appointment" of the main menu, a **phonetic reminding** to the mobile user, about next task's detail (person & time), takes place. In case a collection order referring to the task's person is also scheduled, the user is informed accordingly.

Nearby customers

Through the entry "Customers near me" of the main menu, all **customers within a 10 km distance** from user's location are shown in form of a list or points on the map. By editing a preferable distance in field "Radius", an increase or decrease of the radius is obtained.

Configuration info

Calendar screen

- The ability to **configure** the calendar screen elements is provided. Specifically, the configurable elements are:
  - ✓ Time frame pages and map, with the ability to show or hide them (properties: DisableMap, DisableDayTab, DisableWeekTab, DisableMonthTab & DisableListTab
  - ✓ Default page, with options 0-Day, 1-Week, 2-Month & 3-List (property: DefaultTab)

  The properties above are declared in a specific file placed in Settings area of the calendar screen form (file: CalendarTaskSettings)

Company parameters

- In order **service activities registration** to be feasible for the mobile user, the company parameters referring to the default, per task type, service item should be defined. (e.g. company parameter "Default SOS service for devices")

Mobile parameters

- Available to **calendar screen** are only open service activities. Differentiation of this setting is provided via mobile parameter "Calendar_show_closed_tasks".
- The **morning zone** of calendar screen is displayed as non-greyed. The morning zone definition time limits is performed via the mobile parameters "MorningZoneStartTime" & "MorningZoneEndTime".
- The level of control for **prohibiting interventions** on "closed" service activities is defined in the mobile parameter "SOS_ReadOnlyControl". The available options are: 0-No check, 1-After saving or 2-After signing.

Spare parts warehouse

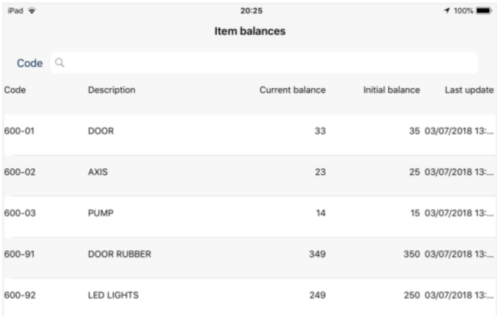
This section describes the ESService application actions that are related with **stock transfers** form & to the device's spare parts warehouse.

Note that…

Based on the default configuration, sales or transfer documents are **not sent** from back-office to the device.

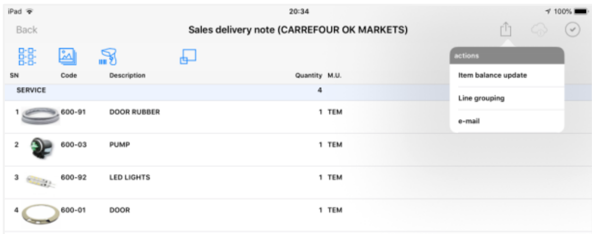
Inventory

The mobile warehouse (van warehouse) matches the actual place (vehicle) that all **stock transfers** are conducted. The vehicle definition, the vehicle connection with a specific van warehouse and the assignment of van warehouse to a mobile user are always conducted in back-office. The provisioning of the van warehouse with an **initial stock** is performed by back-office and through the data initialization process, while **current stock** updating is performed through the sales & stock transfer documents issued by the mobile user. Access to information concerning the van warehouse stock availability is provided via the main menu entry "Item balances".



Sales

When a service activity is completed, and if the functionality of **issuing a sales delivery note** is activated, a delivery note, including all spare parts & consumables used for performing the service activity, is automatically issued-printed reducing at the same time, van warehouse stock with the relevant quantity.



Note that…

To activate the functionality referring to sales delivery note issuing, the "connection" between task type and document type is a prerequisite. This connection is performed in page "**Relevant task types**" of **7-Sales delivery note** mobile document type.

Stock receipt

Van warehouse stocks receipts are always based on a delivery note prepared in back-office and are used to cover **stock replenishment** needs of the van warehouse.

Delivery note

Stock deliveries to van warehouse are implemented via issuing in back-office a document that uses the **delivery note to branch** document type. The delivery note defines the origin & destination warehouses as well as the specific items-quantities to be sent. Beware that, in order a delivery note to be available to the device, the van warehouse must be declared as its destination warehouse.

Note that…

Based on the default configuration, available to the device for the process of stock replenishment are the **printed** delivery notes that their **issuing date-time** exceeds the date-time of the last synchronization.

Stock receipt note

By selecting the entry "Stock replenishment" of the main menu (menu: My tools/ New), the list of delivery notes issued by back-office and referring to van warehouse is provided. When focusing on a specific note, a preview of the items-quantities sent is given. By selecting the option "Receipt" of button "Actions", the data entry screen of a **new stock receipt note** appears with data referring to series-number & origin-destination WH pre-completed which also includes all the items-quantities listed in the selected delivery note. Pressing button "Save" results to issuing the receipt note and to increasing van warehouse stock with the relevant quantity.

Stock delivery

The stock delivery process serves the need of **van warehouse clearance** through shipping loaded stock to back-office. By selecting the entry "Total stock delivery" of the main menu (menu: My tools/ New), the data entry screen of a **new stock delivery note** appears with data referring to series-number & origin-destination WH pre-completed which also includes all the items that have stock in the van warehouse. Otherwise, via the entry "Partial stock delivery", the ability to selectively add items-quantities to the stock delivery note is provided. Pressing button "Save" results to issuing the delivery note and to reducing van warehouse stock with the relevant quantity.

Configuration info

Company parameters

- For the **stock replenishment** process, document type IWB-Intra-warehouse transfers TO Branch is used. Differentiation of this setting is provided through the relevant company parameter.

Mobile parameters

- The field "Family" is used as the default **document lines grouping factor**. Differentiation of this setting is provided through the mobile parameter "Doc_GroupField".
- The preferable size for the **numeric keyboard** can be set through the mobile parameter "NumericKeyboardSizeFactor" (suggested values from 1.1 to 1.8)
- To activate the functionality related to van warehouse monitoring, the mobile parameter "Service_van" should be set to 1-Yes.
- To automatic display the **sales delivery note** issued in the content of a specific service activity, the mobile parameter "Service_show_document_created_by_SOS" should be set to 1-Yes.

Documents

- In order the **document issue** processes to be feasible in ESService application, document series must be defined on a device level and document types & series must be properly configured. (see section EBS application's configuration/ Document types & series)

Recording activities

This section describes the ESService application actions related to the **recording of issues** (service cases, complaints, questionnaires, photo-shoots) that occur during an onsite visit. The recording activities management is provided either from calendar screen and within a selected task or from person screen.

Case

By selecting from the calendar screen and within a selected task, the option "Case" of button "Actions", the **data entry** screen of a new issue appears with data referring to customer-address and starting date-time pre-completed. The mobile user enters a brief description of the issue and, in case the issue refers to a specific item, the related item. In page "Notes" additional comments regarding the issue can be provided. Finally, when case details data entry is completed, pressing button "Save" results to the **saving** of the issue.

Note that…

Based on the default configuration, fields in page "**User-defined fields**" have no functionality. For differentiating this setting -on a customization level- further configuration of the task type and the synchronization process is required.

Complaint

By selecting from the calendar screen and within a selected task, the option "Complaint" of button "Actions", the **data entry** screen of a new complaint appears with data referring to customer-address and starting date-time pre-completed. The mobile user enters a brief description and the category-severity of the issue. In case immediate actions of resolving the problem can be provided, the relevant response is filled in, while if there is a commitment of resolving the problem on a given date, the due date must also be defined. In case the complaint refers to specific items, from the "Contents" page and by using the buttons "Items list" or "Barcode", the **item & complaint comment recording** is performed. Via the "View" & "Delete" buttons, the focused line details presentation & the deletion of the line is performed respectively, though via the "Attachments" button, the ability to display the **attached documents** screen is given. Finally, when task details data entry is completed, pressing button "Close" results to the **saving** of the task and in parallel, if selected, to the changing of its status as completed.

Note that…

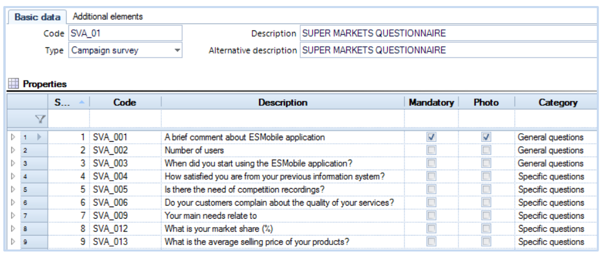
Based on the default configuration, available to the device are the complaints **referring** to the mobile user's **customers list**.

Questionnaire

The questionnaires are used as a tool of collecting "predefined" information regarding either company's customers. The questionnaire completion is usually performed by using the **Data collection** task type.

Inquiries

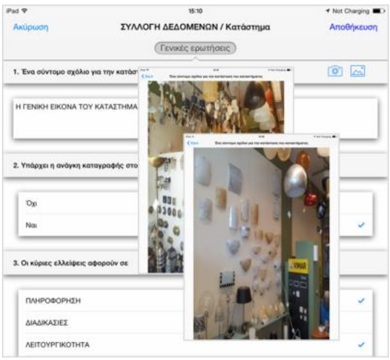
The formation of the questionnaire inquiries is implemented in back-office via the entity Property set (menu: Customization/ Field customization/ Additional properties). The questionnaire may include inquiries of several types (free text, date, number, multiple choice etc.) some of which, via the flag **Mandatory**, may be marked as for obligatory completion. Furthermore, via the flag **Photo**, the ability to define inquiries that may have photo attachments is provided.



Note that...

- Based on the default configuration, available to the device are all **active** property sets characterized as **collect data**.
- From the several property types, the ones of type 6-Value in Base Currency, 7-Code list and 13-View **are not available** to the device.
- The functionality of **photo attachment** is not available neither to "Multi-select list" inquiries nor to inquiries with a predefined "Default value".

Data collection



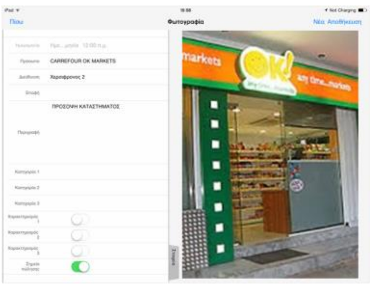
By selecting from the calendar screen and within a selected task, the option "Data collection" of button "Actions", a list with the available questionnaires is provided. When focusing on a specific questionnaire, the **inquiries data entry screen** appears. Concerning the questionnaire's completion specific issues, the same applies as described above in section "Market research". The completing mode differs depending on the "type" of the inquiry. The **mandatory inquiries** are marked with red color, though the ones with **photo attachment** functionality are marked by the activation of buttons "Camera" for capturing photos and "Photographs" for reviewing them. Finally, when inquiries data entry is completed, pressing button "Save" results to the **saving** of the questionnaire and in parallel, if selected, to the changing of its status as completed

Note that...

Based on the default configuration, questionnaires are **not sent** from back-office to the device.

Photo shooting

Photo shootings serve the need of recording, as image files, information related to the mobile user's customers. Photo shooting regarding **persons** is provided either form calendar screen and within a selected task or from person screen. Furthermore, as mentioned above in section "Questionnaire", photo shooting regarding **inquiries** is also supported. Finally, via the entry "Photo" of the main menu (menu: My tools/ New), photo shootings regarding **general issues** can be conducted. By selecting the option "Photo", regardless the referring entity, the **photo task screen** appears. After the photo capturing and by pressing tab "Photo", further details regarding the photo's subject may be defined. Note that, especially for photos referring to "store image", the flag "Point of sales" must be activated. Photos characterized as such are used, in calendar screen, as a store previewing tool. Finally, when photo task details data entry is completed, pressing button "Save" results to the **saving** of a photo task and its relevant image file.



Note that...

- Based on the default configuration, available to the device are photo tasks & relevant image files **referring** to the mobile user's **customers list**.
- Through the entry "**Photos receipt**" of the "Sync" menu, the option of downloading -via an online connection to the server- image files related to photo tasks is provided.

Posting on Yammer

When saving a photo task, and if the functionality of posting on yammer is activated, a relevant message box appears. As for existing photo tasks, the option of posting on yammer is provided by activating the photo task list (menu: Internal notes/ Photos), focusing on a specific photo task and selecting the option "Post on Yammer" of "Actions" button.

Configuration info

Company parameters

- Regarding the **photo shootings**, the area where image files are saved is defined in company parameter "Photos from mobiles - Save in folder".

Mobile parameters

- To activate the functionality related to posting **photos on yammer**, the following mobile parameters must be properly set:

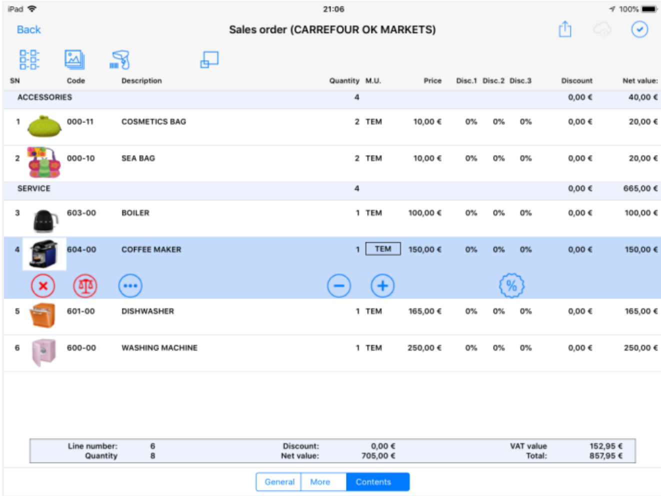
Parameter	**Value**
YammerEnabled	Define value: 1
YammerConversationURL	Define the URL referring to corporate yammer (e.g. https://www.yammer.com/entersoft.gr/#/Threads/show?threadId={0})
YammerGroupID	Define the desired yammer group (e.g. 4470839)

Other activities

This section describes the ESService application actions that **may not be a part of mobile user's daily operations** (sales ordering, collections from customers, user's expense lists)

Sales ordering

Through ESService application full management of sales order documents is available. **Sales order issuing** action is performed either form calendar screen and within a selected task or from person screen. The mobile user is responsible for correct completing the sales orders and for sending them to back-office, while back-office authorized users undertake the necessary fulfillment steps that follow.



Sales order

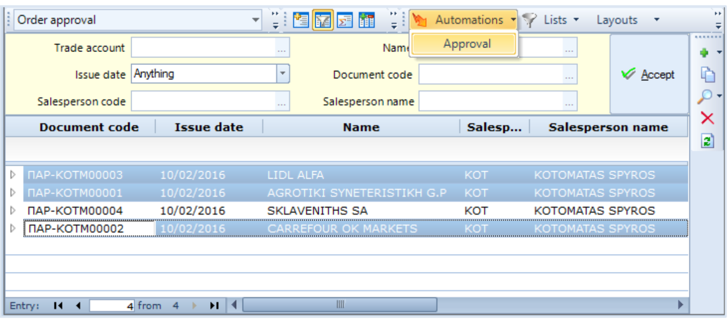
By selecting the option "Order" of button "Actions", the **data entry screen** of a new document appears with header's main data pre-completed. From the "Contents" page and by using the buttons "Items list", "Photo gallery" or "Barcode" **items** selection is performed. Through the options of button "Actions", the ability to connect to the server for renewing **items current balances** or for displaying, only for informative reasons, the valid **prices & discounts** based on the agreed with the customer commercial policy, is given. Finally, when order's data entry is completed, pressing button "Save" results to **saving** the order. When saving the order, and if the functionality of signature attachment is activated, the signature screen appears. By pressing button "Save" on this screen, the **customer's signature** is added to order attachments. Saving the customer's signature indicates the finalization of the document and, after sending it to back-office, any change from the mobile user is prohibited.

Note that…

- Based on the default configuration, sales orders are **not sent** from back-office to the device.
- In case when the order's person is **not marked as a customer**, issuing the sales order, results to auto "converting" him to a customer
- Based on the default configuration, **prices & discounts** declared by the mobile user are not sent to back-office.
- In case ESService application is used as a simple registration tool for sales orders, via the option "Save to server" of button "Actions", the ability to **automatically save** the order **to back-office**, is provided.
- Based on the default configuration, sales orders issued by mobile users are marked **as to be verified** (workflow step: HOLD). Additionally, to differentiate them from orders issued by back-office users, the field "**Dimension-1**" of the document's header automatically gets the value MOBILE.

Order approval

By selecting the option "Order approval" (menu: Sales/ Mobile devices) a list of the sales orders to be approved appears. After the necessary checks are conducted, the specific orders are selected and, pressing the button "Approval", the change of the orders **workflow step** from HOLD to OK is performed.



Configuration info

Mobile parameters

(see section Spare parts warehouse)

Documents

- Through specific configuration, the ability to choose whether the ESService application will be used as a **simple registration** or **issuing** tool is provided. No matter the case, in order the mobile sales documents uploading to be feasible, document types & series must be properly configured (see section EBS application's configuration/ Document types & series).

Cash collection

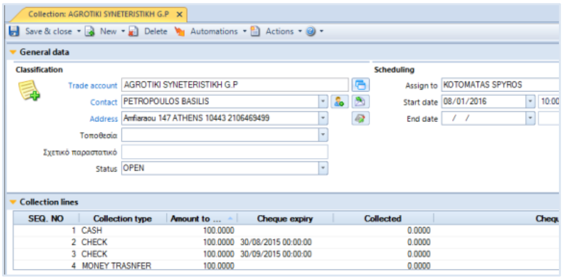
Through ESService application full management of receipt notes is available. A receipt note can be issued either through handling a pre-agreed with the customer **collection order** or through an **ad hoc** registration.

Note that…

In case when the collection's person is **not marked as a customer**, issuing the receipt note, results to auto "converting" him to a customer.

Collection order

The formation of a collection order is implemented in back-office via the task type COL-Collection (menu: Sales/ Activities/ New action). The collection order details define the customer-address, the assigned resource, a pre-agreed due date as well as the payment method & amount to be collected (section: Collection lines).



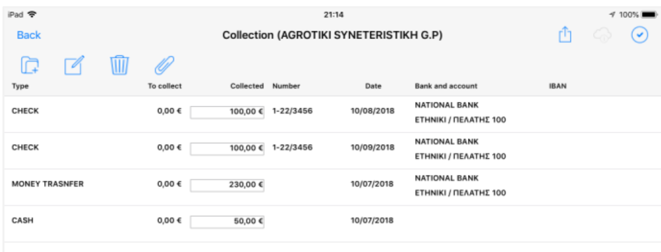
Note that…

Based on the default configuration, available to the device are the collection orders **assigned** to the mobile **resource-user**.

Receipt note

Access to pending collection orders is provided either from calendar screen and within a selected task or from the person screen (page: General-Open collections). Furthermore, via the option "Collection" of button "Actions", the ability of issuing ad hoc receipt notes is given.

When the **receipt's data entry screen** appears, regardless the menu option used to activate it, page "General" is pre-completed with header's main data. Especially in case the receipt note is based on a specific collection order, the page "Contents" is also pre-completed with the amount to be collected. From the "Contents" page and by using the button "Payment method" the **detailed amounts** recording is performed. Via the "View" & "Delete" buttons, the focused line details presentation & the deletion of the line is performed respectively, though via the "Attachments" button, the ability to display the **attached documents** screen is given. Finally, when receipt details data entry is completed, pressing button "Save" results to **saving** the receipt note and to changing its status as completed. Note that, while saving the receipt note the collections in cash check is activated and, if the declared amount exceeds the relevant limit, a warning message appears. The save & complete option indicates the finalization of the receipt note and, after sending it to back-office, any change from the mobile user is prohibited.



Configuration info

Mobile parameters

- The preferable daily **limit for collections in cash** is defined in mobile parameter "CollectionLimitPerCustomer".

Documents

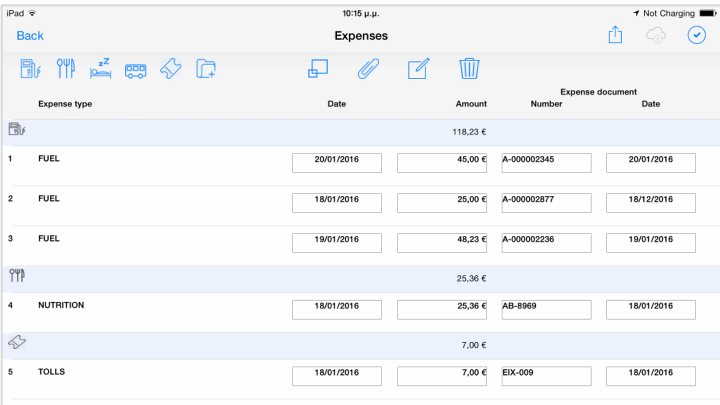
- Through special configuration, the ability to choose whether ESService application will be used as a **simple registration** or **issuing** tool is provided. No matter the case, in order the mobile receipt notes uploading to be feasible, document types & series must be properly configured (see section EBS application's configuration/ Document types & series).

Expenses list

The expenses list is a "standard" form used by the mobile user for the **completion** – **submission** of **expenses** conducted in the context of a specific tour. The mobile user is responsible for correct completing the expenses lists and for sending them to back-office, while back-office authorized users undertake the necessary approval actions that follow.

New expenses list

By selecting the entry "Expenses list" of the main menu (menu: My tools/ New), the data entry screen of a **new expenses list form** appears where, in page "General", the description and duration of the tour must firstly be filled in.



From the "Contents" page and by using either the expense type direct selection buttons (e.g. "FUEL") or the "Expense type list" selection button, the **detailed expenses** recording is performed. Via the "View" & "Delete" buttons, the focused line details presentation & the deletion of the line is performed respectively, though via the "Attachments" button, the ability to display the **attached documents** screen is given. Finally, when expense details data entry is completed, pressing button "Close" results to the **saving** of the expenses list and in parallel, if selected, to the changing of its status as completed. By holding the expenses list in status "In progress" lets it available for additions, while the save & complete option indicates the finalization of the expenses list and, after sending it to back-office, any change from the mobile user is prohibited.

Expenses approval

By selecting the option "Preparation of expenses" (menu: Financials/ Expenses) the expense lists to be approved appear. In the stage of approval, which is always conducted by back-office authorized users, the ability to add further details concerning the proper accounting posting of expenses is provided.

Note that...

- Based on the default configuration, available to the device are all expenses lists -regardless the status- **assigned** to the mobile **resource-user**.
- Via the relevant automation, the ability to **transfer attached image files** form expenses lists to relevant expense documents is provided.

Configuration info

Documents

- Expenses lists in status "Completed" create automatically -via the synchronization process- the relevant EBS **Expense documents**. A prerequisite to auto document creation is that document types & series are properly configured at **services profile** entity. (see section EBS application's configuration/ Document types & series)

Reporting

This section presents the available from the ESService application reports. These reports are mostly based on local data and are designed to provide **managerial & statistical information** regarding the mobile user activities.

Activities overview

The ESService application has several overview lists regarding the activities performed by the mobile user. For activities related to customers (service activities, sales, cash collections etc.) access is provided through the relevant options of menu "**Actions**" though for activities related to inter-company communication (cases, expense lists etc.) access is provided through the relevant options of menu "**Internal notes**".

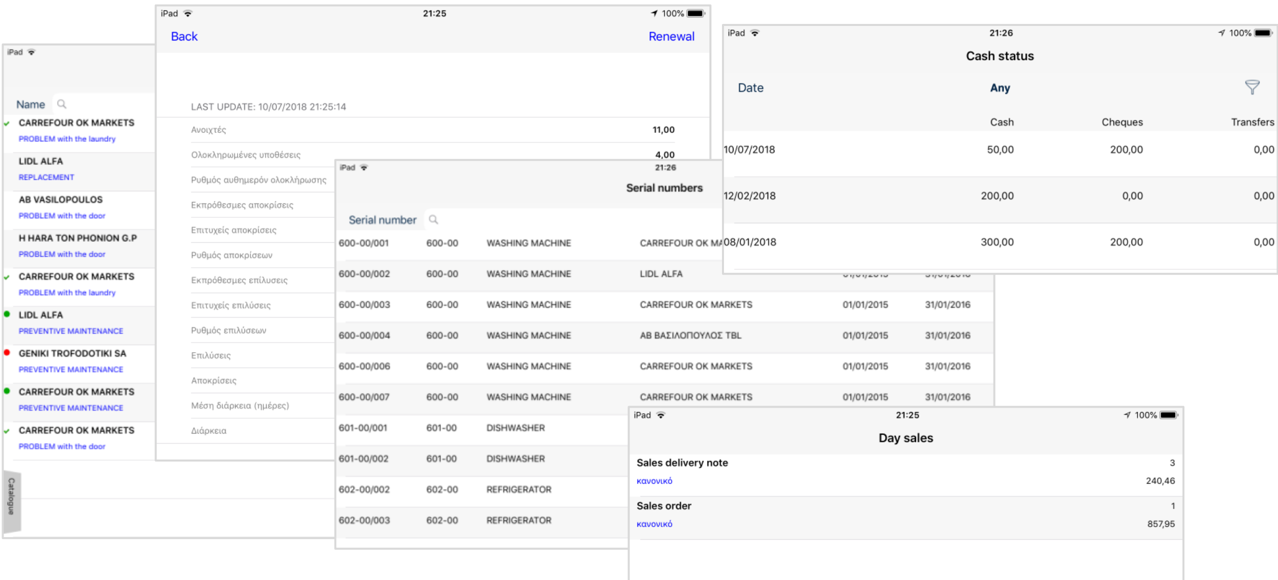
Note that…

For activities that have **status tracking** (e.g. service activities), the icons used for marking their current status are Canceled, Completed and Signed. On the contrary, activities without status tracking (e.g. sales documents), are marked relatively to the **synchronization process** (Unsent).

Statistics

The ESService application has several reports that can be used from the mobile user as useful **informative** or **decision-making** tools.

- **Serial numbers**. Provides information regarding the total number of serial numbers available to the device analyzed by serial numbers per person-address.
- **Item balances**. Provides information regarding the van warehouse's current stock availability.
- **Response indexes**. Provides information regarding the quality of the service activities performed by the mobile user.
- **Day sales**. Provides information, per day, regarding the number & value of sales documents registered by the mobile user.
- **Cash status**. Provides information regarding scheduled & actual receipt notes assigned to the mobile user.



Systems communication

The devices, through direct **connection** and **communication with back-office,** can either download updated information or upload local transactions. This section refers to actions related to connectivity checks and data synchronization processes.

Note that…

When a device gets a new ID and in order to avoid **redefinition of its settings**, the ability to connect the new ID with an existing device record is provided via the option "Update device with new identifier" of "Automations" menu.

Connectivity

In order data interchanging processes to be feasible, the device and back-office connectivity must be ensured. The **Internet** and **IIS & Application server** connectivity checks are provided via the relevant options of button "Connectivity". In case of communication problems, the necessary information about possible causes is given.

Synchronization

By selecting one of the available options of button "Synchronization", the mobile user can run the necessary, at the specific time, **data synchronization** process.

Data sending

The data sending process uploads to back-office the latest **transactions or data modifications** performed by the **mobile** user (new persons or addresses, completion of assigned tasks, new tasks or documents, etc.)

At the beginning of data sending process a notification message appears regarding the amount and the nature of data to be sent. By selecting "OK" or "Cancel" buttons the process is activated or stopped respectively. At the end of the process, a notification message regarding the total duration appears. In case the data sending process is not feasible, a message explaining the problem cause appears.

Note that...

Via the appropriate settings, the option of **showing** or **hiding** the notification message regarding the size of data to be sent is provided (menu: Settings/ Auxiliary tasks).

Data receiving

The data receiving process downloads to the mobile device all **updates in data** performed by **back-office** users (persons & contacts updates, new tasks to be performed by mobile user, etc.)

At the end of data receiving process, a notification message regarding the amount of downloaded data and the total duration appears. In case the data receiving process is not feasible, a message explaining the problem cause appears.

Data synchronization

The data synchronization process includes both sending & receiving data process, activating at first the **data sending** from device process, then the **data importing** to back-office process and finally the **data receiving** from device process. The provided messaging about data amount & process duration is the same as described above in sections regarding the discrete execution of sending-receiving data.

Data initialization

The data initialization process starts at first with **data sending** and then proceeds to the **deletion** and **recreation** of the device's local database. The recreation ensures that local database includes the last updated back-office & device data. At the end of data initialization process, a notification message regarding the total duration appears.

Note that...

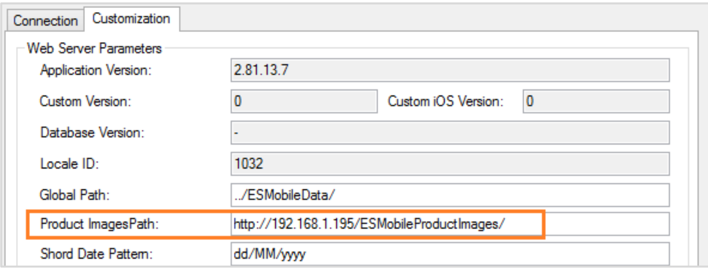
The first time the application is **installed on a device**, data initialization process is activated automatically once the user enters its login credentials. Thereafter, data initialization is required only in cases when the local database recreation is wanted (e.g. change of the mobile resource-user).

Photo receiving

The photo receiving process **downloads** to the mobile device -via an online connection to the server- **image files** related either to the items catalogue (option: Items) or to photo tasks (options: Points of sale & Other photos). At the end of photo receiving process, a notification message regarding the number of downloaded photos appears. In case the photo receiving process is not feasible, a message explaining the problem cause appears.

To facilitate the parallel use of **different versions** of an ESMobile application, the image files which are related to the item catalogue and the photos, can be stored in a common folder, regardless the application. The required settings are:

Item catalogue



- Create the storage area should as a **virtual directory** of IIS server (e.g. ESMobileProductImages).
- Declare the **URL of this area** to the relevant field of IIS customization tool.

Photos

- Create the storage area should as a **virtual directory** of IIS server (e.g. ESMobilePhotos)
- Declare the **URL of this area** to company parameter "Photos from mobiles-Save in folder" (e.g. http://192.168.1.195/ESMobilePhotos/)

Note that...

Based on the default configuration, the **item's code** is used as the item-photo connection field and the image files must be of type **jpeg**. Differentiation of these settings is provided by changing respectively the mobile parameters "ItemFieldImageName" & "ImageFileExtension".

Tools & Settings

This section presents the mobile device **configuration** options and a series of **auxiliary & informative tools** available to the mobile user.

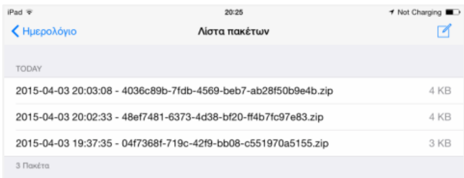
User preferences

- **Main menu**. Via the option "Main menu" of the "Settings" screen, the user may adjust the main menu according to his own preferences. The activation of these settings will be viewable after the restart of the ESMobile application.
- **Map**. Via the option "Map" of the "Settings" screen, the user may configure items related to the look of "Calendar" and "Customers near me" screens.

User tools

- **Version check**. The option "Version check" of "Sync" menu executes a version comparison between the ESMobile application installed on the device and the one installed on back-office (IIS Server). When the comparison is completed and if the two versions are different, a relevant message appears giving at the same time the option of downloading the new version. Note that, by activating the selection "Automatic version check" of "Settings" screen (menu: Settings/ Auxiliary tasks), when login the application, the version check runs automatically.

- **Internet connection check**. Deactivating the option "Checking internet connection" of "Settings" screen, (menu: Settings/ Auxiliary tasks) the ability to stay connected to the server, even when the device is not connected to the internet, is provided.
- **Show data to be sent**. When the selection "Show data to be sent" of the "Settings" screen (menu: Settings/ Auxiliary tasks) is activated, at the beginning of data sending process a notification message appears regarding the amount and the nature of data to be sent.
- **Check data packages**. The option "Send pending packages" of "Sync" menu at first checks the device for data packages that are not yet sent to back-office and then, in case such a package exits, automatically activates the data sending process. Furthermore, through the option "Sent packages" of "Sync" menu, the list of packages sent from the device to back-office is given. Focusing on a list entry and selecting the "E-mail" button, the ability to send the specific package via e-mail is provided.



- **Local database**.Via the option "Database backup" of the "Settings" screen, the ability to backup (create copy) or restore (recover copy) the local database is provided. Furthermore, via the "Sent database" option of button "Sync", the local database file can be sent directly to back-office.
- **Other data files**. Via the option "Usage" of the "Settings" screen (menu: Settings/ Maintenance tasks), information regarding the local image-sound files is provided, giving at the same time the ability to delete these files.
- **Application's folders**. The option "Customization files" of the "Settings" screen (menu: Settings/ Maintenance tasks) provides a list of folders regarding the ESMobile application configuration files that are installed on the device. Especially for the command files (folder: ESConfig/ Commands), by focusing on a specific file, further information about the command's properties is given.

Regional settings

- **Language**. Via the option "Application language" of the "Settings" screen, the ability to define the preferable language is provided.
- **Formatting**. The formatting issues of location data (dates, numbers & currency) depend on the value of the mobile parameter "**Culture**". Especially for **Currency** type fields, the following configuration options are also provided:

- ✓ Currency symbol (mobile parameter: CurrencySymbol). Define a specific symbol or currency code (e.g. € or EUR). Character "space" is used for no symbol
- ✓ The positive or negative value format (mobile parameter: CurrencyPositivePattern or CurrencyNegativePattern). The available options are:

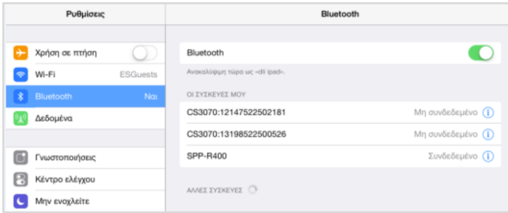
Possitive value		**Negative value**							
0	**$n**	0	**($n)**	4	**(n$)**	8	**-n $**	12	**$ -n**
1	**n$**	1	**-$n**	5	**-n$**	9	**-$ n**	13	**n- $**
2	**$ n**	2	**$-n**	6	**n-$**	10	**n $-**	14	**($ n)**
3	**n $**	3	**$n-**	7	**n$-**	11	**$ n-**	15	**(n $)**

Note that…

The labels of **date-related** fields (month, day etc.) always respect the language setting of the ESMobile application.

Printer settings

The entry "Printer" of the "Settings" screen activates the functionality of printing documents via the ESMobile application. The printers compatible to ESMobile application are **Bixolon SPP-R400** and **Zebra ZQ520** as well as **AirPrint** type printers. The prerequisites for the activation of a printer within ESMobile application are the identification of the printer from the mobile device and the printer-device "pairing".



EBS application's configuration

This section refers to a series of **back-office configuration** elements that contribute significantly in the proper functioning of ESService application.

Mobile user

Users

Special attention must be given to the following configuration points:

- **Physical person**. The mobile user must be opened as a resource and an application user. These two entities must be connected by referring to the same physical person.
- **Resource role**. The resource entry referring to the mobile user must have the role "Technical support" or "Services".
- **Services profile**. At the section "Companies - Branches" of the user administration screen, the entry referring to the user's main branch must be connected to a specific services profile.
- **Persons/ Company associates**. It is suggested, the physical person referring to mobile user to be defined as company's person. Via this definition, the field "Supervisor" of stock documents uploaded to back-office will be filled in automatically.

Warehouses

Special attention must be given to the following configuration points:

- **Company's warehouses**. You must open one warehouse per device.
- **Services profile**. The user's profile field "In the van warehouse" & "Spare parts warehouse" must be filled in with device's WH and the central destination WH respectively.

Devices

Special attention must be given to the following configuration points:

- **User**. The field "User" must be filled in with the user's code. Since the connection of user-resource via the same physical person is defined, the field referring to resource will be filled in automatically.
- **Status**. The device's status must be defined as "For initialization" or "Operates". In any other case, the execution of the synchronization processes is not allowed.
- **Mobile application**. The value "Service" must be selected.
- **Operating system**. The value "Apple iOS" must be selected.
- **Trace method**. To deactivate the functionality of recording user's position, the trace method should be set to "No recording". Based on the default configuration, the user's position recording is activated in actions: Start-End of service activity and Document generation.
- **Communication permissions**. Enables the user's rights to execute several online processes via a 3G connection. The available processes are: New version downloading, Send-Receive data, Online business policy and Online reporting. Activating the option "All customers", the ability of downloading, via data synchronization process, the full customers list, is given.
- **Substitute user**. The substitute user serves cases when the basic mobile user is unable, for any reason, to carry out the tasks assigned to him. At the first login with the credentials of the substitute user, the initialization process is performed automatically. Afterwards, the substitute user can execute all scheduled tasks assigned to the basic user.

Main entities

Customers list

Special attention must be given to the following configuration points:

- **Customer code**. The customer code must be defined as auto generated. Furthermore, the text regarding the code prefix must be defined in the relevant company parameter. These definitions are required in order, the process of uploading to back-office documents issued by the device that refer to new customers, to be feasible. The term new customer refers to customers primarily entered by the mobile user.

- **Address data**. To display the customers as points on the map, all data referring to their addresses as well as the address's longitude & latitude must be filled in correctly. A prerequisite, for the automatic completion of these data, is the activation of the company parameter "Use of the mapping services server".
- **Attachments**. The attachments entity must have an auto generated counter. This definition is required in order, the process of uploading attachment files to back-office, to be feasible.

Items & Services

Special attention must be given to the following configuration points:

- **Available on mobiles**. In order an item (inventory item or service) to be downloaded to device, both its grouping factors and the item itself must have the characterization "Available on mobiles".
- **Item type**. In order an inventory item to be available at service activity's items selection list, item's "Type" should be set to
- "Spare part" or "Consumable".
- **Item's comments**. In order item's extent comment to be downloaded to device, the company parameter "Download comments on items" must be activated.

Service terms

Special attention must be given to the following customization points:

- **Provided services**. We enter at least one per service task type and we define the connected item-service.
- **Service terms**. We enter at least one general term that "Covers all items". In this term we define at least one provided service per service task type.

Note that...

The definition of provided services & service terms is done through the "Customer case/Service management" menu of the EBS application.

Expense types

Special attention must be given to the following configuration points:

- **Available on mobiles**. In order an expense type to be downloaded to device, the "Available on mobiles" option should be activated.
- **Type of expense**. The suitable "Type of expense" must be defined. This information is used to connect the expense types with the relevant direct selection buttons.
- **Expense code**. In field "Item", the **expense code** relevant to the specific expense type must be defined. Beware that the expenses defined in this field have properly set data referring to "VAT category" and "Related supplier". This information is used by the process of auto creating EBS Expense documents

Liquidity accounts & Notes

Special attention must be given to the following configuration points:

- **Auto payment account**. At least one liquidity account in basic currency defined as automatic payment must be opened. This account is assigned, via the synchronization process, to receipt lines of cash or note type. To differentiate the automatic payment account per device, the preferable liquidity account must be defined on a document series' level.
- **Bank accounts**. One bank type liquidity account per collaborating bank must be opened. These accounts are available to the mobile user when adding an in-transfer collection line. To differentiate the bank accounts per customer, the preferable bank account must be defined on a customer's level.
- **Note code**. The note code must be defined as auto generated. This definition is required in order, the process of uploading new receivable notes to back-office, to be feasible.

Task types

To perform the service activities via ESService application, the existence of the **default task types** is a prerequisite. The default task types' installation process is described hereafter:

Select the option "Import data (advanced mode)" of menu "Import/Export data". Go to folder \\ESMigration\ESCRMZero and open the file **CRM_ZeroMigration_V4.emi**. Define the "source space" for the data to be imported (\\ESMigration\ESCRMZero for the Greek version and \\ESMigration\ESCRMZero\EN for the international version) and press button "Run".

Configuration info

Task type code

- **Service tasks.** For service activities recording, task types **SOS**-Service on Site, **ROS**-Replacement on Site & **PRM**-Preventive maintenance are used. Differentiation of this setting is provided through the relevant company parameters.
- **Case**. For cases recording, task type **CASE**-Case is used. Based on the default configuration, this setting cannot be changed.
- **Complaint**. For complaints recording, task type **COM**-Complaint is used. Based on the default configuration, this setting cannot be changed.
- **Questionnaire.** For questionnaires recording, task type **RDC**-Data collection is used. Based on the default configuration, this setting cannot be changed.
- **Photo**. For photos recording, task type **PHOTO**-Photograph is used. Based on the default configuration, this setting cannot be changed**.**
- **Collection**. For collections recording, task type **COL**-Collection is used. Differentiation of this setting is provided through the relevant company parameter.
- **Expenses**. For expenses recording, task type **EXP**-Expenses is used. Based on the default configuration, this setting cannot be changed**.**

Assignment rules

- The roles that have permission to **perform an activity** are defined in section "Assignment rules" of the task type screen. To provide to a mobile user the permission of performing the various activities, role "Technical support" or "Services" must be defined and the flag "Assignment possibility" must be activated.

Task type for mobile

- **Usual duration**. Defines the task's default duration (minutes). Based on the default configuration, the duration for task types Service activity & Sales task is set to 60 minutes.
- **Preparation time**. Functionality not available in ESxVan application.
- **Grouping field**. Defines the field that is used as the task lines grouping factor. Based on the default configuration, the field "Family" is used.
- **Days/ Future tasks**. Defines the preferable number of days to send, via the data synchronization process, scheduled tasks from back-office to the device. Based on the default configuration, the limit for all task types is set to 7 days. Note that, available to the device are all scheduled tasks assigned to the mobile resource-user.
- **Days/ Closed tasks**. Defines the preferable number of days to send, via the data synchronization process, closed tasks from back-office to the device. Based on the default configuration, the limit for all task types is set to 0 days. Note that, available to the device are all closed tasks related to mobile user's customers list regardless the "assigned to" resource.
- **Signature**. Defines whether, when closing a task, the customer's signature screen appears. The ability to select between optional or mandatory signature is provided. Based on the default configuration, this feature is deactivated in all task types.

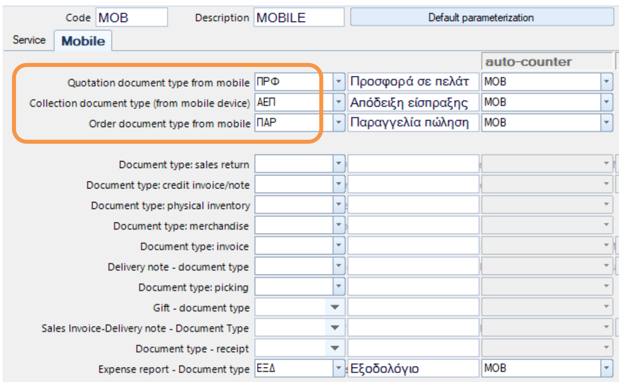
Note that…

The task type for mobile configuration elements are available only for task types that have the "Task group" characterization: **Mobile or Mobile_Custom**.

Document types & series

To activate the ESService application's functionality of document registration, the existence of the **default document types** as well as the definition of the suitable **document series** -per document type- are a prerequisite. Of all the document types available in ESService application are: 0-Sales quotation, 1-Sales order, 2-Returns note, 7-Sales delivery note, 12-Intra-warehouse transfers FROM Branch, 13-Intra-warehouse transfers TO Branch & 51-Cash receipt.

The installation steps of default document types are the same with the ones described above in section "Task types", while the document series definition varies depending on whether the ESService application will be used as a simple registration tool or as documents issuing tool.



- **Simple registration**. The document's number is generated, via the **sync process**, once the document is registered to back-office. In this case, the document series must be defined on a user's services profile level. The simple registration functionality is available only for document types: **Sales quotation**, **Sales order** & **Cash receipt**. Note that, the EBS document series defined on services profile level must be characterized as "Auto" and must have all registration & printing checks deactivated.
- **Issuing**. The document's number is generated once the document is registered in **ESService application**. In this case, the document series must be defined on a user's device level. The documents issuing functionality is available to all document types of **ESService** application with the limitation that the document series assigned to the device refers to the auto template (that means the template that has the options "Manual" & "Cancelation" deactivated). Especially for the **transferring stock** document types (sales & intertransfers), document issuing is mandatory. Note that, the EBS document series defined on device level must be characterized as "Manual" and must have all registration & printing checks deactivated.

Configuration info

Mobile documents type

- **Measurement unit**. Defines the document's line default measurement unit. The available options are: Basic, Sales, Returns & Alternative.
- **Same item behavior**. Defines the effect of selecting an item preexisting in the document. The available options are: Add, New line, Warning & Prohibition.
- **Stock level check**. Defines whether, on inserting an item in the document, the check of its stock availability, in van warehouse, is automatically activated. The available options are: No, Warning & Prohibition.
- **Available**. Functionality not available in ESService application.
- **Prices & discounts**. From all setting referring to prices & discounts, the only functional in ESService application is the "Pricing zone".
- **Apply discounts**. Functionality not available in ESService application.
- **Apply invoicing policy**. Defines whether the "Apply business policy" action activates the process of applying commercial policy via an online connection to the server.

- **Credit policy**. Functionality not available in ESService application.
- **Auto apply online business policy**. Defines whether, when saving the document, the "Apply business policy" action is auto activated.
- **Has value**. Defines whether, while entering items in the document, the line fields referring to values (price, discounts, net value etc.) will be automatically filled in. Base on default configuration, this option is activated to all ESService application's document types.
- **Send values**. Defines whether prices & discounts of documents registered in ESService application will be sent, via data sending process, to back-office. Based on the default configuration, document's prices & discounts are not sent to back-office.
- **Online save**. Defines whether the "Save to server" action is available to the mobile user. Note that, this action is feasible only in documents that their document type is set as a "simple registration", via ESService application, tool.
- **Send while saving**. Defines whether, while saving the document, the process of data sending is automatically activated. The available options are: No, Send and Send all.
- **Restriction from note**. Functionality not available in ESService application.
- **Package**. Functionality not available in ESService application.
- **Signature**. Defines whether, when saving a document, the customer's signature screen appears. The ability to select between optional or mandatory signature is provided. In the case of a document types with document series, signature feature configuration should be performed on the document series template relevant field.
- **Mandatory use of series**. Defines whether, while saving the document, the document series completion check is automatically activated. Base on default configuration, this option is activated in all document types except the 0-Quotation note, 1-Sales order & 51-Receipt note.
- **Add or reduce Quantity-Value & Calculation method**. Determine the document type's behavior. Note that, no intervention in document type behavior is allowed.

Document series template

- **Print command**. The ESService application command that activates the functionality of document printing.
- **Printing option**. Defines whether the functionality of document printing is automatically activated on document save. The available options are: Directly, With question & No.
- **Manual**. Functionality not available in ESService application.
- **Cancelation**. Functionality not available in ESService application.
- **Saving checks**. Functionality not available in ESService application.
- **Printing checks**. Functionality not available in ESService application.
- **Signature**. Defines whether, when saving a document, the customer's signature screen appears. The ability to select between optional or mandatory signature is provided.

Document series

- **Number of copies**. Defines the number of copies to be printed.