ESMobile SFA Daily processes & use cases

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

Use & Configuration Guide

Identity

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Contents

Introduction

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

- Familiarizing the user with the ESMobile application user interface.
- Providing the ESMobile application user with the necessary information to execute its basic daily operations.
- Guiding the system administrator regarding configuration issues of the Entersoft Business Suite (EBS) application that are related directly with the operation of the ESMobile application

Requirements for using the ESMobile application and the present manual include:

- being familiar with -all the necessary setup & configuration actions for the IIS & Application server (Entersoft Business Suite version **5.3.0.1** or later)
- being familiar with the interface & use method for each mobile device
- proper set-up of the required equipment

Note that

The present manual applies to all ESMobile platforms (iOS, UWP, Android). The parts that, by way of exception, relate to a specific ESMobile platform, are marked accordingly.

Symbols

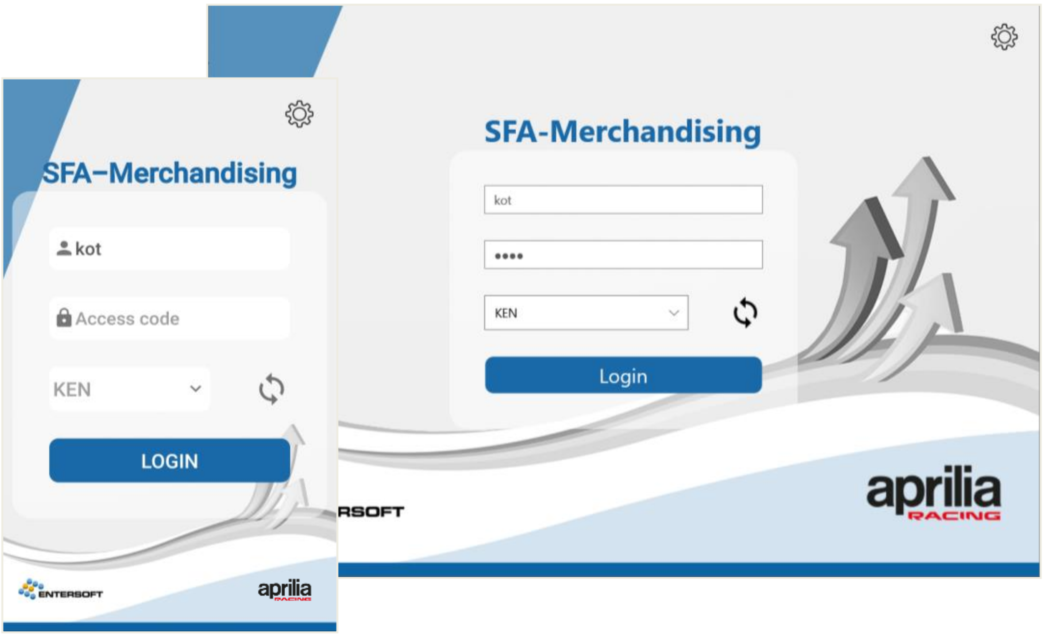
	iOS platform		EBS application
	Universal Windows (UWP) platform		Connection to Back Office is required
	Android platform		Internet connection required

User interface

This section refers to the main elements of the ESMobile application user interface. First comes a brief description of the login screen and main workspace and the main display features of the display entries type of screen, as well as the data entry screen. Please note here, that the interface is has been appropriately adjusted for tablet or phablet-based devices.

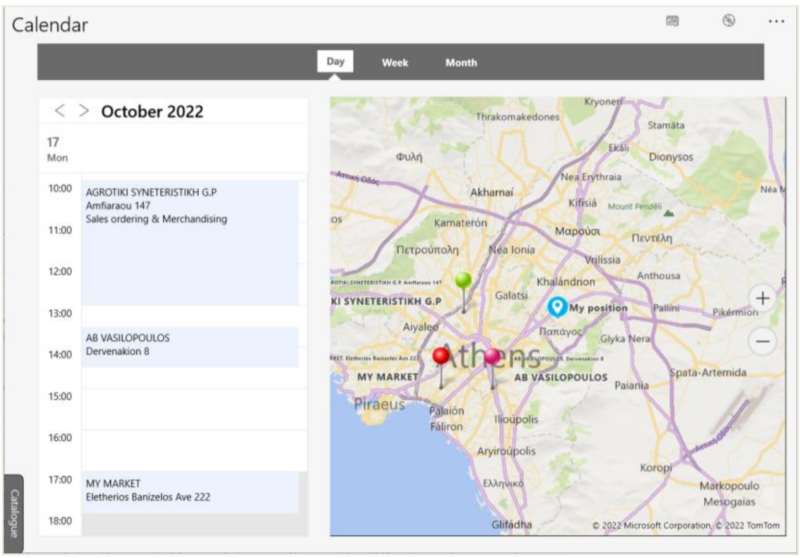
Login screen

The ESMobile app call displays the application login details input screen (user name, access code & branch). Via the -Settings button, it is possible to directly access the ESMobile device operation parameters configuration screen and a series of auxiliary & informative tools provided to the device user. It is also possible - by means of appropriate configuration - to enhance the login screen with the company logo of the installation. Reference to the required settings is given in the Ideas & Solutions/ User interface/ Login screen section of the MOB-ImplementationGuide manual.



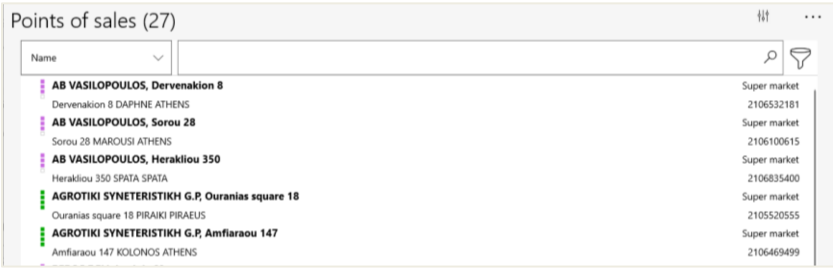
Calendar

Upon login to the ESMobile application, the workspace is automatically occupied by the calendar screen, where the current scheduled tasks of the day are displayed, in the form of tags or pins on the map. By selecting the “Week” & “Month” pages, the current tasks of the week-month can be viewed correspondingly. It’s also possible to navigate to previous or upcoming intervals. By focusing on a specific task, the user will be redirected to its dashboard screen.



Overview screen

The overview screen displays the entries of an entity in the form of a list. At the top-left of the screen, the screen title is displayed, while the top-right displays buttons with the available alternative criteria -Sort & -Search for the list entries. By focusing on a specific entry, the user will be redirected to the dashboard screen of the current entry.



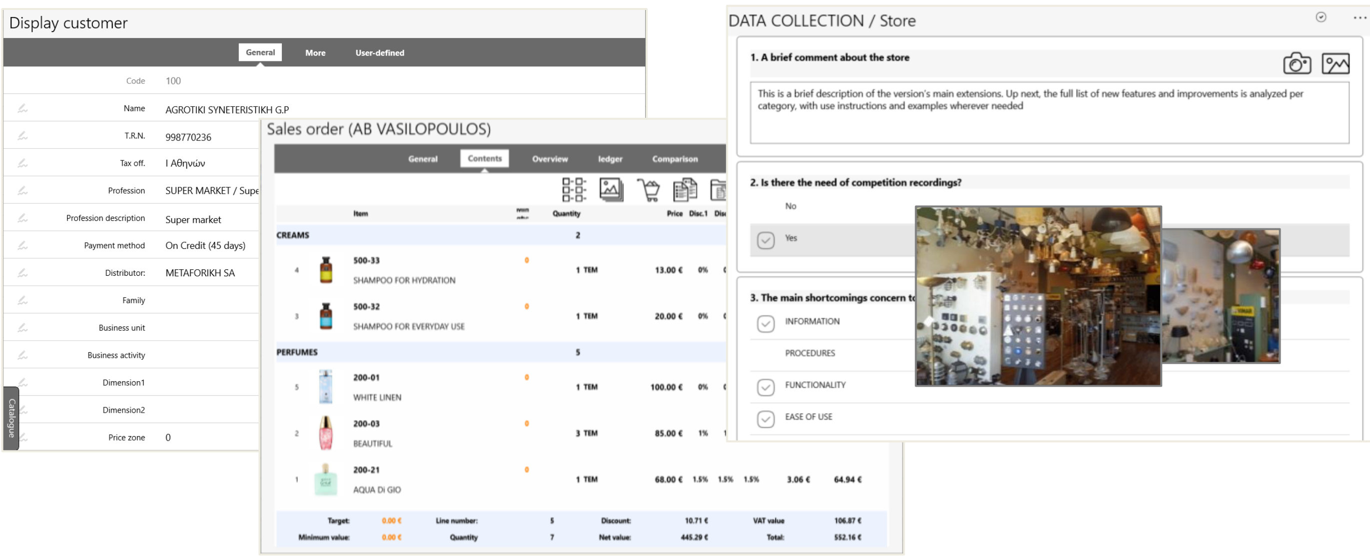
Dashboard screen

The dashboard screen is an "appendix" to the overview screen that enables both an increase in the information displayed on the overview screen and the ability to directly perform a series of actions. The upper part of the screen is occupied by the individual pages of the screen, while the lower part of the screen displays the preset menu buttons to call actions.

- New entry.
- Reporting by direct connection the back office.
- Reporting by local data.
- Go to the Data entry screen.
- Go to the management screen for relevant documents.

Data entry screen

The data entry screen is used to manage the data of an entity. Both the display format and the functionality of the data entry screen varies considerably, depending on the entity it's handling each time.

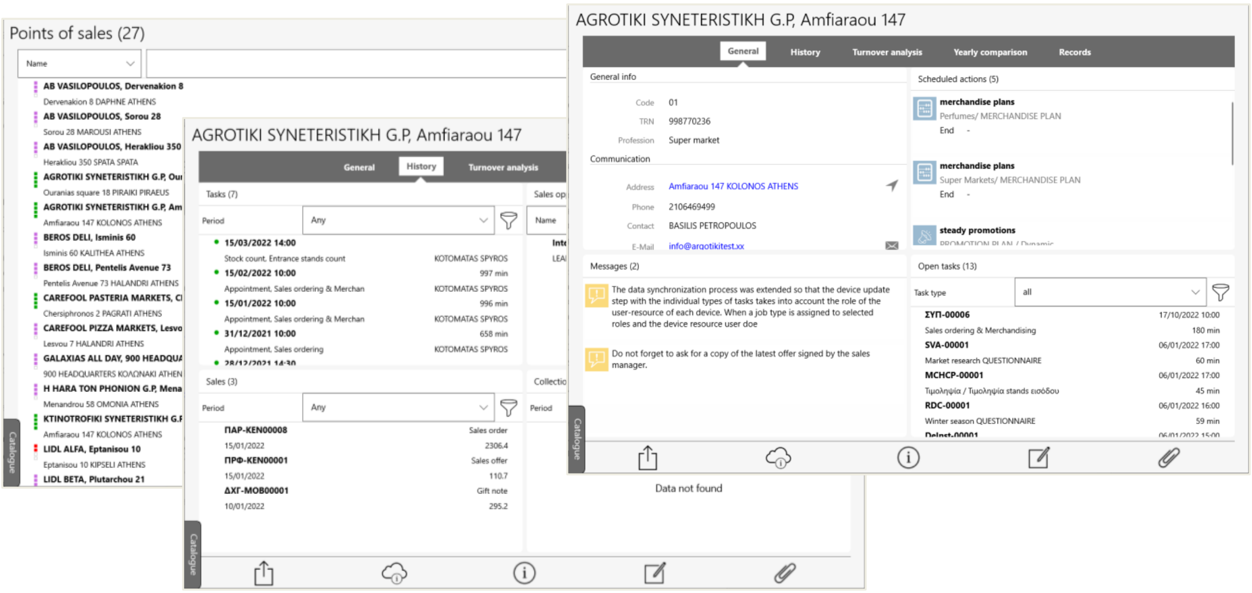


Main entities

In this section the main entities are described, meaning the persons (customers & contacts, competitors, etc.) and the items that are necessary for the execution of the individual ESMobile application processes. Note that, the full administration of main entities takes place in the back office and any data changes by the mobile user are prohibited.

Customers & Contacts

Access to the device customers list is provided via the main menu Customers or Points of sales options. By selecting these options, the complete customers list appears, sorted alphabetically by name. Searching a specific customer is possible either by using their name or other identification data (phone number, address, TRN, occupation, etc.), while in order to distinguish the persons that are already customers based on ABC assessment a specific color marking is used (A B C). When focusing on a specific customer, the user is redirected to their dashboard screen, where they have access to information regarding their activity (open tasks, appointments-documents history, etc.) or their financial data (ledger, open notes, etc.). At the same time, it is possible to directly perform a series of actions (e.g. add new appointment or take photo). By clicking on the elements of the “Communication” area, it is possible to directly use alternative means of communication (e.g. map navigation or sending an e-mail). An amount of customer financial information is also provided, directly connected to the back office, via the -Online button, while via the -Attachments button, it is possible to go to the management screen for the customer's attachments.



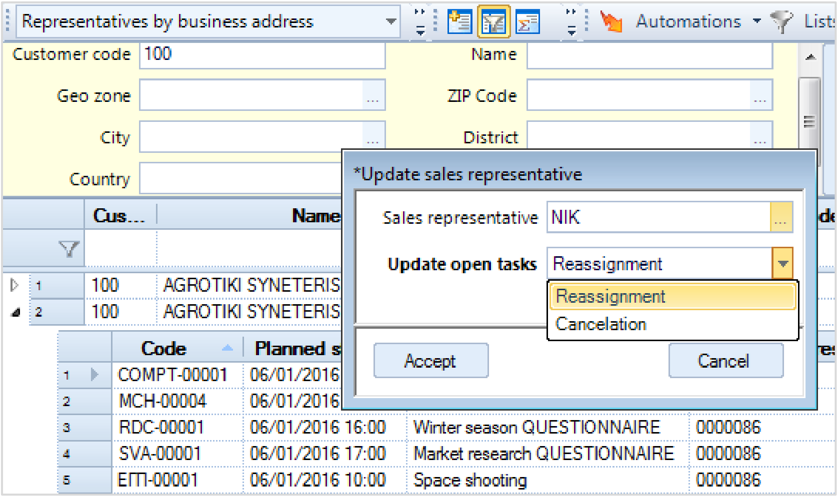
Access to the Contacts list is provided via the relevant option of the main menu (menu: Customers & Contacts/ Persons). By clicking on this option, the complete full list of persons appears, sorted alphabetically by name. When focusing on a specific contact, the user is redirected to its dashboard screen, which allows use of alternative communication methods (e.g. map navigation or sending an email), as well as access to further information (e.g. related companies).

Customer assignment

The device customer assignment is performed by the back office and based on the salesperson-client relation. This relation can be set by means of an appropriate setting of the salesperson field,

- of the Customer screen, in order to assign all of the customer's points of sales to a specific vendor
- of the screen for Transaction details by address, to refine the assignment at the point of sales level of each client.

In order to facilitate the process of assigning or redistributing customers, it is possible to bulk update customers & point of sales with a particular salesperson. This process is executed by calling the "Representatives by business address" option (menu: Marketing/ Merchandise/ Reports). Initially, a list appears, with the POS and the salespersons to which each point is assigned, while, at a second level the pending tasks display by POS. By focusing on specific POSs and selection the option "Update customer representative / POS", the salesperson designation screen appears, where the point of sales assignment will be done, at the same time allowing the reassignment or cancellation of pending tasks.



New customer

The "New" main menu option (menu: Customers & Contacts/ New) makes it possible to register a new active or prospect customer. Registering the customer's identification data is possible:

- By the user directly registering their data. With regard to the address data, they are filled in automatically based on the current position (latitude-longitude) of the device. Note that, It is now possible to check, in direct connection with the back office, on the existence of a customer, by using the TRN as the identification field. The check is performed by indicating the preferred TRN on the new customer screen and then clicking on the Check T.R.N field.
- Automatically by the system. By entering the customer's TRN and pressing the -Retrieve registration data button, the system automatically populates the identification data (Name, Tax office, Description of occupation) and address data of the customer. Enabling this feature requires populating the company parameter "Search Basic Enterprise Registration Info - Credentials" (ES_TAXISNET_PUBLICAFM) with the necessary login information for the TaxisNet information system.

Specifically when saving a prospect customer, a new task of type ES.LEAD-Lead is registered, with the device salesperson-user as "representative".

Settings

Default value

Mobile parameters

PreferredCountryInternationalID — GR

The default country code, when entering a new address. Make sure that it is identical to an existing code in the table "Countries" (ESGOZCountry table). Note that the "retrieve registration data" button is only available when this parameter has EL or GR as a value.

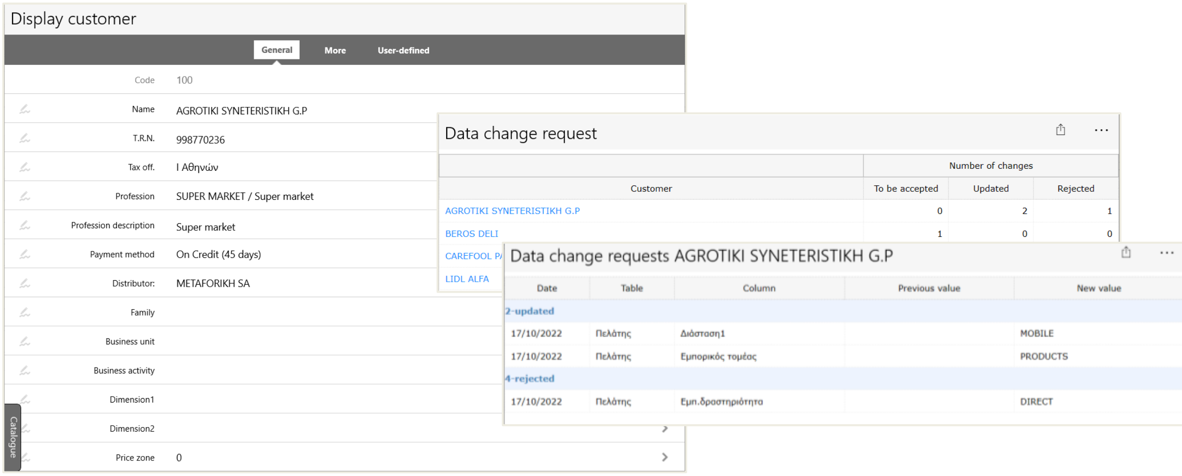
Data change request

Through the ESMobile application it's possible for the device user to record changes that have to do with the customer identification or communication data. The device user is responsible for properly recording the changes and sending them to the back office, while back office authorized users then undertake the necessary approval actions that follow.

By focusing on a specific customer from the customers list and pressing the -View button, the customer data entry screen appears.

By focusing on the data to be changed, entering the new value and pressing the -Save modification button, the application automatically generated a new data change request, which includes the specific changes.

Information on the progress of data change requests is provided by the Data change requests option in the main menu (menu: My tools/ Internal notes).



Note that

- Registering a data change request is possible for entities Customer, Point of sales, Prospect customer and Contact.
- All fields for which data change requests are activated are marked with the icon .

Data change approval

By selecting, from the back office, the Requests for data modification (menu: Marketing/ Merchandise/ Reports) option displays a list of the requests to be approved, that have been registered by the individual devices. At this point it is possible for a user from the back office with the appropriate privileges to accept or reject the suggested changes. Selecting several changes and pressing the "Update entries" button results to updating customer data and marking the selected changes as "Completed", while pressing the "Reject changes" button results to marking the selected changes as "Canceled".

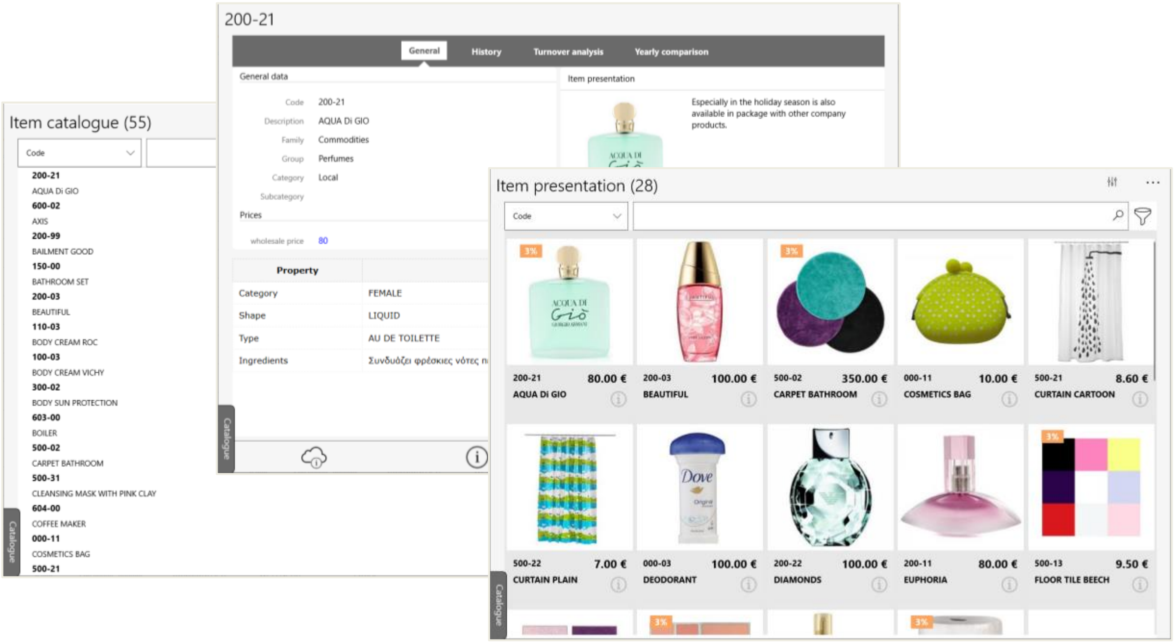
Other persons

Apart from the customers list of the device's salesperson-user, available to the device are also persons characterized as transporters or competitors. Access to the Transporters or Competitors list is provided via the relevant main menu options (Customers & Contacts/ Persons). By selecting these options, the complete persons list appears, sorted alphabetically by name. When focusing on a specific person, the user is redirected to its dashboard screen, which allows direct use of alternative communication means (e.g. map navigation or sending an email), as well as access to a series of actions(e.g. submit new task).

Item catalogue

Access to the Items catalogue is provided via the relevant main menu option (menu: Items and Prices). By selecting this option, the complete list of items appears, sorted alphabetically by item description. Searching for a specific item can be done either by item code or by other identification data (description, manufacturer, grouping elements, etc.) When focusing on a specific item, the user is redirected to its dashboard screen, where they can access information regarding either its additional attributes (technical specifications, measurement units, etc.) or the item's availability data. An amount of information regarding item shipment details is also provided, directly connected to the back office, via the -Online button options, while via the -Attachments button, it is possible to go to the management screen for the item attachments.

Furthermore, through the Items presentation option, it is possible to display the item catalogue in the form of a photo-gallery. By selecting this option from the main menu, the complete list of items appears, sorted alphabetically by item description. Searching for a specific item can be done either by item code or by other identification data (description, manufacturer, grouping elements, etc.)



Photos receipt

Through the Photos receipt option of the “Sync” menu, it is possible to download, from the back-office device folder _ProductImages_, the image files of the item catalogue.

At the end of photo receiving process, a relevant notification message appears to the user, regarding the number-volume of downloaded photos. Additionally, in case the photo receiving process fails for some reason, a message including the cause of the error appears.

Note that

Step-by-step instructions for the required settings to download the photos can be found in the Tools & Configuration/ Systems communication/ Data synchronization/ Photos receipt section of the present manual.

Appointment management

This section describes the ESMobile application actions related to organizing the user's daily operations as well as the available tools, for the execution of said operations. Managing the individual actions is usually done via the Calendar's dashboard screen, while also allowing the user to manage them via the dashboard screen of the specific customer or point of sales.

Shift entity

The shift entity provides the ability to include all activities performed by the mobile user, within a specific time frame, while also making it possible to post receipt - delivery information, regarding the cash & vehicle managed by the user. It should be noted here, that in the context of the ESMobile SFA application, a shift is simply a recording tool, that does not provide any further functionality to the application.

By calling the Start shift option from the main menu (menu: My tools/ Work shifts), appears a screen to submit a new shift appears with the start date-time data already filled in. The user enters the information regarding the cash & vehicle data and, by pressing -Save, verified the start of the shift. Note that, the shift start process cannot be performed while the current shift is still "active". Likewise, when completing the daily operations and by selecting the menu End shift menu option, appears the screen to enter cash & vehicle delivery data. By filling in this information and pressing -Save, the process of ending the current shift is completed.

Calendar

The scheduled appointments from the back office are displayed on the Task calendar. At the same time, the user can add a new appointment either ad hoc ("New" button), or based on a default visit plan ("Plan" button). Firstly, the current date appointments are displayed, while selecting the "Week" & "Month" tabs will allow the user to review the current week-month appointments respectively, as well as navigate to previous or upcoming time intervals.

Specifically in the case of daily appointments display, they are also directly displayed in the form of a pin on the map. By focusing on a pin, a pop-up screen appears, with the details of the selected point of sales. In case ES.PHOTO-Photo type tasks exist with the "Point of sales" attribute, the screen is enhanced with photos of the point. At the same time, it's possible to display the distance in cm between the user's current position and the selected point of sales. Specifically in the UWP & Android platforms, this information is available through a specific Google service (Distance Matrix). Therefore, in order to display it, its activation key should be assigned in the company parameter "Password for use of Google mapping service" (GoogleKey). Finally, pressing the -Information button redirects the user to the dashboard screen for the point of sales, while pressing the -Routing button redirects them to the specialized Maps application, with the starting point and the destination automatically filled in.

By focusing on a specific appointment from the Calendar, the user is redirected to its dashboard screen, where further information is provided, regarding activity (open tasks, task-document log, etc.) or financial data (ledger, open notes, etc.) of the relevant customer.

Furthermore, information regarding the customer's financial data is provided, in direct connection to the back office, via the -Online button options. By using the -View button, the current appointment's data entry screen appears, while by using the -Actions button it is possible to directly perform a series of actions (e.g. add new appointment or document). Finally, by using the -Attachments button, it is now possible to display the attachments management screen of the appointment.

Settings

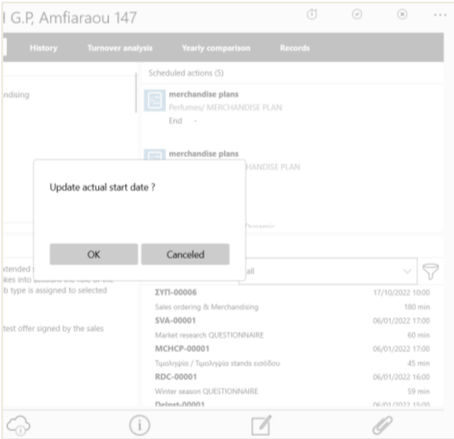
Setting	Default value
Mobile parameters	
Calendar_show_closed_tasks Show only open tasks (0-No) or all tasks regardless of status (1-Yes) in Calendar.	0-No
MorningZoneStartTime The morning zone starting time. This information is used to define the non-grayed area of the calendar screen.	08:00
MorningZoneEndTime The morning zone end time. This information is used to define the non-grayed area of the calendar screen.	17:00
Appointment_is_Container Display the add new task or document actions only through the Calendar dashboard screen (1-Yes) or also through the customer & point of sales dashboard screen (0-No).	1-Yes

App_Days_Edit_Allowed The number of days allowing changes to data of past appointments. By setting the value to 0, the check is completely deactivated.	0

Advanced settings

Screen display format Step-by-step instructions on how to set up - at an application customization level - the Calendar screen display format can be found in the Special screens/ Calendar/ Display format section of the MOB-ImplementationGuide manual.

Appointment handling



Going to the Calendar dashboard screen and pressing the -Start button updates the current appointment's start date-time, while pressing the -Completed button first checks that the appointment has started and then updates the appointment's end date-time and changes the appointment's status to 2-Completed. If, for any reason, the user wishes the current appointment to be canceled, pressing the -Cancel button initially displays the cancellation reason selection list and then updates the appointment end date-time and changes its status to 3-Canceled. If we want to ensure the accuracy of the time-location data of the appointment, a corresponding recording of the current position in the GPS events file is also triggered, using the appropriate settings, at the start-end of the appointment. Instructions to activate the position recording can be found in the EBS application configuration/ Device user/ Devices section of the present manual.

Pressing the -View button of the Calendar screen dashboard redirects the user to the data entry screen of the current appointment. This screen allows the user to modify the appointment data, perform a series of actions (-Actions button), as well as saving it while at the same time changing its status (-Save button). Note that, in appointments where the device user has only the role of participant, on the appointment only comments are allowed, which are saved in the “Comments” field of the entry concerning the specific participant.

Data entry screen

Description	Filled-in by the user.
Person	The customer of the entry from which the appointment was added. Cannot modify this field.
Contact	The default is the entry contact from which the appointment was added.
Address	The default is the entry address from which the appointment was added.
Task means	The default comes from the corresponding field of the task type.
Planned start	The default is the current date-time.
Closing date	The default value shall be calculated by taking into account the "Planned start" of the task and the "Usual duration" of the task type.
Refers to, Location, Result	Filled-in by the user.
Cancellation reason	Filled-in by the user. If an appointment is canceled, this field must be populated.
Sales opportunity	If an appointment is added in the context of a sales opportunity, this specific opportunity will be the default.
Actual start	It is updated by the appointment start process. Cannot modify this field.
Actual closing date	Updates when the appointment is completed. Cannot modify this field.
Status	Updates when the appointment is saved. Cannot modify this field.
Notes	Filled-in by the user.

Technical information

On iOS platforms and from version 3.10 onwards of the iOS ESMobile app, it has been possible to manage the ES.APP-Sales Meeting & ES.STK-Sales Task as a "general" task. In case of a new installation, activating this management mode is strongly recommended. However, in the case of upgrading from an earlier version of the application, activation should only take place after consulting with the project implementation team. The actions needed to "move" to the new management mode are:

- Defining, on the company parameter, "The sales meeting and sales task act as all other task types" (AppTodoAsTask) of 1-Yes. After changing the parameter value, the user must refresh the system cache.
- Run the data initialization process on the device. At the end of the initialization process, the stand-alone tables of the ES.APP-Sales Appointment (ESTMAppointment table) and ES.STK-Sales Task (ESTMToDO table) task types are now inactive. At the same time, the mobile Appointment_creator_enable parameter automatically takes the value 1-Yes.

Note that, on UWP & Android platforms, this management mode is always enabled, regardless of the parameter value.

Participants

From the appointment's data entry screen and by selecting the New participant option of the -Actions button, a list with the available recourses appears. Selecting the preferred resources from this list and pressing the -Add button, adds the participants to the current appointment. Access to the participants list of an appointment is provided through the corresponding -Information button, in the appointment's dashboard screen.

Duration monitoring

Through the appointment duration monitoring process, it is possible to display the actual time spent by the user while performing all the tasks scheduled within the context of a specific sales appointment. This feature is based solely on the activation of individual checks related to the existence of an active appointment, i.e. an open appointment that has already started. These checks shall ensure that:

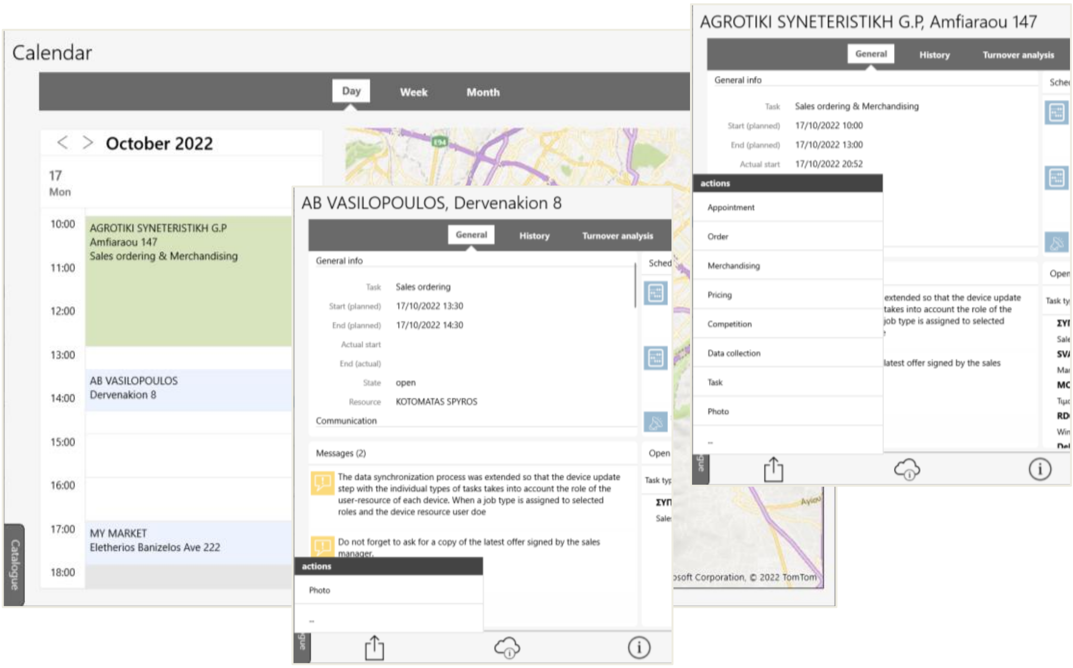
(1) at all times, there is only one active appointment that is being timed

(2) other actions are only allowed to be performed within the point of sales of the active appointment

Focusing on an inactive appointment and pressing the -Start button on the Calendar dashboard screen, the system initially checks that there is no other active appointment, and then updates the start date-time of the current one, starts timing and at the same time the individual options of the -Actions button are made available. The appointment continues to be timed for the duration required to perform the individual actions, while the end of the appointment is marked by pressing the -End button of the Calendar screen dashboard. At this stage, the end date-time of the current appointment is updated, it stops being timed, and its status changes to completed.

Example

Let's say, for example, that the necessary settings have been applied so that the device user is not allowed to perform any action during an inactive appointment, except for taking photos.



Provided that an appointment hasn't started, by first going from the Calendar environment to the dashboard screen, at any of the scheduled appointments and pressing the -Actions button, we see that only the "Photo" action is available to select. The same is true regardless of where an action is being attempted (e.g. a client dashboard screen or a point of sales one).

Then, right when an appointment is started, all the options of the -Action button are automatically available for the current point of sales, while remaining unavailable for the other points of sales. This change in button behavior applies to all areas of the application from which an action is attempted (e.g. a client dashboard screen or a point of sales one). At this stage, and until the end of the current appointment, the ability of starting another appointment has also been removed.

Finally, at the end of the current meeting, the cycle of checks begins again, both on the ability to start an appointment and the ability to perform other actions. To make it easier for the user to locate the active appointment, its background color automatically changes to -light green.

Settings

Default value

Company parameters

The sales meeting and sales task act as all other task types(AppTodoAsTask)

The appointment duration monitoring process is only available when this company parameter is 1-Yes.

International ID for "Sales appointment" task(AppointmentInternationalID) — ES.SAP

The task type that "participates" as a sales appointment in the individual checks of the appointment duration monitoring process.

Mobile parameters

AppointmentStartControl — 0-No check

Activates the check when calling the "Start" action on an appointment. The available options are:

- 0-No check. Check not activated.
- 1- With check If an active appointment already exists, at the start of another appointment, a prohibitive message appears.

AppointmentStartControlRange — 0-Today

The check range when calling the "Start" action on an appointment. It works in conjunction with the AppointmentStartControl parameter and only when that has a value of 1-With check. The available options are:

- 0-Today. Checks whether there is an active appointment on the current date.
- 1-Anytime. Checks whether there is an active appointment regardless of date.

Task type for mobile devices

Check action New... — 0-No check

The control level of -Action button options in the dashboard screen. It works in conjunction with the AppointmentStartControl parameter and only when that has a value of 1-With check. The available options are:

- 0-No check. Check not activated.
- 1-Warning. If there is no active appointment for the current point of sales, a relevant warning message is displayed when calling the add task action of that type.
- 2-Prohibition. If there is no active meeting for the current point of sales, a prohibitive message appears when calling the add job action of that type.
- 3-Not available. If there is no active appointment for the current point of sales, the add task action of that type is completely hidden from the button,

Document type for mobile devices

Check action New... — 0-No check

The control level of -Action button options in the dashboard screen. It works in conjunction with the AppointmentStartControl parameter and only when that has a value of 1-With check. The available options are:

- 0-No check. Check not activated.
- 1-Warning. If there is no active appointment for the current point of sales, a relevant warning message is displayed when calling the add document action of that type.
- 2-Prohibition. If there is no active meeting for the current point of sales, a prohibitive message appears when calling the add document action of that type.
- 3-Not available. If there is no active appointment for the current point of sales, the add document action of that type is completely hidden from the button,

Technical information

For actions in the form of New#Command & Doc#Command, the hide feature (value 3-Unavailable) is automatically enabled. To hide other types of action, the user must appropriately configure the IsAvailableValidation property of the corresponding command.

e.g. to hide the “Collect data” action (action: Edit#PropertySetListForm)

```
<PropertySetListForm    Assembly="Entersoft.Mobile.ESMobile"
                        Type="Entersoft.Mobile.ESMobile.ListFormCreatorCommand">
  <Params>
     <FormID Type="System.String" Value="PropertySetListForm" />
     <Title Type="System.String" Value="Συλλογές δεδομένων" />
     <Filter Type="System.String" Value="c.GID is null and i.GID is null" />
     <BaseSelect Type="System.String" Value="…" />
     <IsAvailableValidation Type="System.String"
                            Value="Select ESValidateAvailableAction ('[CURRENT]')"/>
  </Params>
</PropertySetListForm>
```

Planned actions

On the General (Planned actions section) page of the Calendar dashboard screen, displayed is a list of the campaigns to run at the current point of sales. By focusing on a campaign and pressing the appropriate button, the available - by campaign type - actions are immediately called.

Campaign type	Button	Comment
1-Market research		add questionnaire
2-Merchandising plan		add counting add pricing
3-Special agreement		add positive response add negative response
4-Promotional Program (Fixed)		add positive response add negative response
5-Promotional Program (Dynamic)		add promotion counting add gift document

Reporting on the progress of the campaigns to be carried out during the current period is provided by the Campaign responses option of the main menu (menu: Info/ Statistics).

Note that

Detailed instructions for the required planned action configuration settings are provided in the Merchandizing Activities section of this manual.

Budget allocation

The Budget allocation screen is a tool that enables you to define the budgeted turnover per appointment. Please note here that this tool is only available on iOS platforms.

By calling the Budget allocation option of the main menu (menu: My Tools/ Appointment management) a list of the open appointments is displayed. By pressing the Cycle button on the upper left part of the screen, the current budget's periods-amounts are displayed. The allocation of budgeted turnover per appointment is done by selecting a period, defining the preferred amount, selecting one or more of the listed appointments and pressing -Accept.

Settings

Default value

Company parameters

Merchandising: Sales representative Budget sheet type
(MerchandiseSalesRepBudgetProfile)
The budget type code associated with the salesperson-user of the device.

Merchandising: Sales representative Budget scenario
(MerchandiseSalesRepBudgetScenario)
The budget scenario code associated with the salesperson-user of the device.

Mobile parameters

AppointmentTargetFieldName — NumericField1
The appointment's field where the budgeted turnover of the appointment is assigned.

Task planning tools

Bulk import tasks

The -New button on the Calendar screen allows the user to bulk import tasks by selecting entries from a point of sales list or from an appointments list. Alternatively, it is also possible to call the bulk import tasks screen by continually focusing on a specific date-time of the "Week" page. Using this method will display the screen with the start date information already populated.

Regardless of the method chosen, the task creation time frames (start date-time, preparation & duration minutes) are first defined and the preferred task type of the tasks to be imported is selected. Note that, the task types displayed as available are the ones that, in the "Show on Calendar" field, have the 1-Show without time commitment or 2-Show and time commitment. Then, focusing on the preferred entries in the list and pressing the -Import button starts the bulk import tasks process. Imported tasks are placed in succession in the "available" time, taking into account both the working hours and non-working days of the company, as well as the tasks already planned assigned to the device user.

Settings

Default value

Company parameters

Calendars: Seasonal calendar (ES_SEASON_CALENDAR_CODE)

The seasonal business calendar. Used by the bulk appointments import process to ensure that the tasks are not placed on non-working days. Note that, a necessary requirement for the proper update of a non-business day table to be performed from the back office of the "Update working dates" process (menu: Tools and Configuration/ Maintenance tasks).

Mobile parameters

StartWorkingTime — 08:00

The start of business hours. Used by the process of bulk appointment import process to place the tasks in working hours.

EndWorkingTime — 17:00

The end of business hours. Used by the process of bulk appointment import process to place the tasks in working hours.

Appointment_creator_enable — 1-Full

The bulk import tasks scenario (-New button) of the Calendar screen. Concerns the iOS platform only. The available options are:

- 0-Simple. Limited flexibility scenario. It is recommended to avoid using this scenario.
  1-Full. It is possible to select entries from a point of sales list or from an appointment list, as well as the option to select a task type. Note that in order to be able to select a task type, the AppTodoAsTask company parameter value must be 1-Yes.

Advanced settings

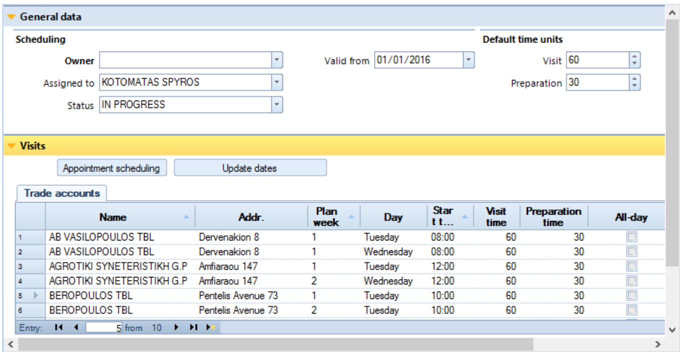
Screen functionality

Step-by-step instructions on how to set up - at an application customization level - the functionality of button -New are available in section Special screens/ Calendar/ Functionality/ Bulk import tasks section of the MOB-ImplementationGuide manual.

Appointment plan

The appointment plan is a scheduling tool for the appointments of the device user. The formation of the appointment plan is carried out by the back office, while also allowing the device user to make changes to its data.

Plan formation



Appointment plans are compiled by the back office, using the SVPL-X-Van Visit Plan task type (menu: Sales/ Activities/ Reports). The individual plan details determine the Valid From, Assigned To, as well as the detailed data of the appointments to implemented held (Visits section).

Plan preview

The main menu Visit plan option (menu: My tools/ Appointment management) allows the device user to preview the available plans, fully manage the scheduling items of already existing entries, as well as add new entries.

Plan execution

By placing the cursor on a specific week day and calling the -Plan button of the Calendar screen, a list of scheduled appointments of the day is displayed per plan. Selecting the preferred list entries and pressing the -Select button starts the import process of the corresponding appointments. Note that the appointments imported are placed on the exact day-time mentioned by the plan, regardless of whether it is in or out of working hours-day and whether another task already exists at the same time interval.

Settings

Default value

Mobile parameters

VisitPlanSelectionEnabled — 1-Yes

Enables, in the bulk appointment import process per plan (-Plan button), the ability to select entries.

- 0-No. Imports appointments for all entries.
- 1-Yes. Imports appointments for the user-selected entries.

Advanced settings

Plan Button

Based on the ESMobile application product implementation, the -Plan button is disabled. Instructions for activating the button - at an application customization level - are provided in section Special screens/ Calendar/ Functionality/ Appointment Plan of the MOB-ImplementationGuide manual.

Bulk copy appointments

The bulk copy appointments process is a tool for easy import of appointments, characterized by their element of repeatability when it comes to scheduling time.

By placing the cursor on a specific day, week, or month and by calling the -Copy button of the Calendar screen, a list will appear, with open & completed appointments that are within the time interval of our choice. By selecting the preferred list entries and pressing the -Select button, a screen appears to set the start date for placing the copied appointments. Then and by confirming the selections, an exact copy of the appointments selected is created, which has simply shifted in terms of time, based on the set start date. It should be noted, that each of the copied appointments is placed within the time limits indicated in the corresponding appointment to be copied, whether these are within or outside business hours and regardless of whether they coincide with the time limits of another already scheduled task. The exception is the case where the day of the copied appointment coincides with a non-working day and it is moved at the same time limits with the working day that comes right after it.

Settings

Default value

Advanced settings

Screen functionality

Step-by-step instructions on how to set up - at an application customization level - the functionality of the -New button are available in section Special screens/ Calendar/ Functionality/ Bulk copy appointments of the MOB-ImplementationGuide manual.

Next appointment

Through the Next appointment option of the main menu, a phonetic reminder is available for the mobile user, with the next appointment's details (customer & time). In case there is also an open task for the appointment's customer, the user is informed accordingly.

Technical information

Specifically on UWP & Android platforms, the following platform-specific device settings are required, to enable the phonetic reminder:

- -Android. Set the Text-to-speech Google engine as the "Preferred engine" (Settings/ Text-to-speech/ Default engine)
- UWP. Add, if not already available, the preferred language for the phonetic reminder(see article https://support.microsoft.com/en-us/windows/appendix-a-supported-languages-and-voices)

Nearby customers

Through the Nearby customers of the main menu, it is possible to display, in the form of a list as well as a pin on the map, the points of sales that are located within a specific distance from the device user's current location. The default km radius can be set in the corresponding field of the "Settings" screen (screen: Settings/ Services profile/ Map) but, by pressing the -Radius button, it is possible to limit or extend the radius through the environment of that screen. It should be noted, that the nearby customers screen also allows you to directly call the bulk import appointment process for points of sales that meet the set km radius.

Settings

Default value

Advanced settings

Screen functionality

Step-by-step instructions on how to set up - at an application customization level - the Nearby customers screen display format can be found in the Special screens/ Nearby customers section of the MOB-ImplementationGuide manual.

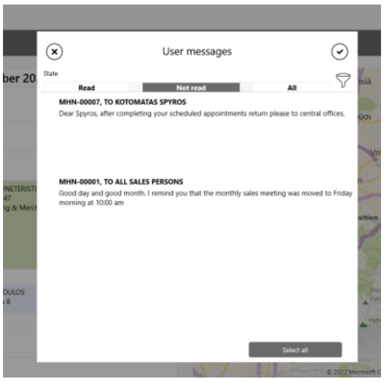
Messages

Message with response recording

The messages with response recording are a means of informing the device user about issues that concern either the **user** themselves ("Representative"), or specific customers of the user's customer list ("Promotion" or "Point of sales") These messages have a specific validity period and remain "pending" until the user confirms them as read.

Compose message

Composing a message can be done in the back office, via the task type MES-Message (menu: Marketing/ Merchandise/ Reports). The individual elements of the message define its validity period, point of sales, for customer-related messages (section: Point of sales) or the user resources, for messages related to device users (section: Representatives), as well as the message contents (section: Notes).



Message to user

When login into the application, a list of all unread messages appears, that have been composed in the back office and have the device resource-user as recipient. When focusing on a specific message, and by pressing the -Read button, the message is marked as "read". Access to the full message list is also provided via the Messages to the user option in the main menu (menu: My tools/ Internal notes).

Message to customer

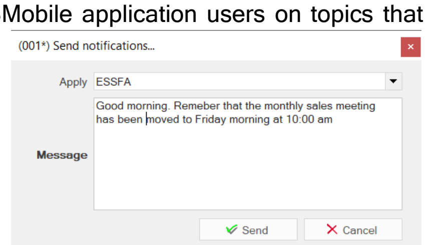
Unread messages to a customer are accessed from the General (section: Messages) page on the Calendar dashboard screen. By focusing on a specific message and pressing the Read-button, the message is marked as "read" and also removed from the pending messages list.

Settings

Settings	Default value
Mobile parameters	
MessageOnLoginCommand The command that specifies the data in the message list to the user.	UnreadUserMessageListForm

Notification type message

Messages of the notification type are a direct means of direct & mass information for ESMobile application users on topics that concern them. The special feature of this type of message is that it appears to the user immediately when it is sent, regardless of whether the user is in the ESMobile app environment at that moment.



The message is composed by the back office and via the "Device manager" screen (menu: Sales/ Mobile devices). From this list of available devices, the user can select the ones they wish and call the Send notification action. On the screen that appears, the user specifies the ESMobile application, the message to be sent and presses the button "Send".

Technical information

To be able to send a notification to a device, the device notification ID must be designated in the back office. The notification ID is automatically assigned by the system upon the initial installation of ESMobile. Alternatively, the "Prepare to send notification" automation allows the notification ID to be manually assigned. Note that the notification ID information associated with each application-device is provided by the corresponding field in the "Settings" screen of the ESMobile application.

Attachments

From the attachment management screen, it is possible to download attachments from the back office, to attach files from the device and to preview the contents of an attachment. The attachments functionality is available for the entities: Item, Person-Customer-Address, Task, Document & Expense list.

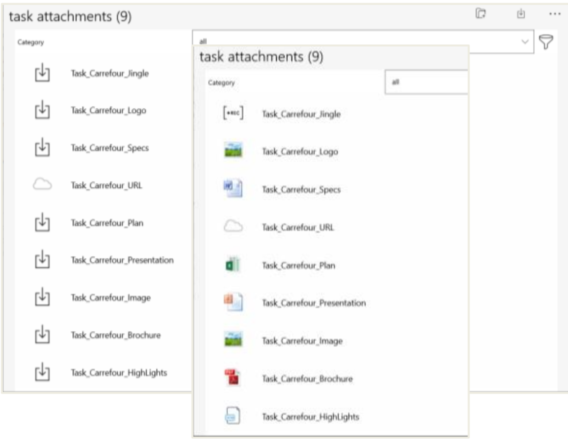
Technical information

- In order to be able to send attached files to the back office that are primarily added by the user of the device, an automatically generated counter must be designated in the back office for the attachments entity (entity: ES00Documents).
- In order to be able to manage attachments as non-blob, the following settings are required:
  - ✓ Set value 1-Yes to company parameter “Save attachments to server” (SRVISBLOB).
  - ✓ Set area ...ESMobileData\ESSync\Memos of the IIS Server to company parameter "Folder on Application Server for saving attachments" (SRVRELATEDOCSPATH).

  These settings ensure that both non-blob attachments from the back office can be downloaded, as well as that device attachments can be sent to the back office as non-blob.

Attachments download

Access to the full, regardless of entity, attachment management list is provided via the “Attachments” option of the “Sync” menu. Furthermore, by pressing the -Attachments button of an entity’s Dashboard screen (e.g. Item entity), a list of all attached documents related to the selected entry appears. Regardless of the application part from where the user will call the attachment management screen, pressing the -Actions button, allows the user to download the attachment files from the back office to the memos application folder. When the download process is completed, the icon marking the documents to be downloaded (icon) is also automatically replaced with an icon that corresponds to the specialized type of each document. The available document types to download, as well as each individualized, by document type, icon, are:



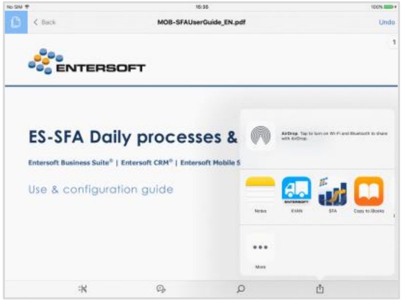
DOC	PDF	WAV
XLS	HTML	URL address
PPT	JPG or PNG	Other

Attaching a file

By pressing the corresponding buttons-options of the attachment management screen, it is possible to add an attachment of type image or audio.

- Image. The image-type file is attached either by selecting an existing photo or by taking a new photo. When the user is done taking a photo it is also possible to fill in some information (Description, Category & Group) on the attachment. It should be noted, that specifically on the iOS Platform, by setting the 1-Yes value to Mobile Memo_Disable_FolderButton, the option to select an existing photo is disabled .
- Audio. Attaching an audio type file is only possible by performing an audio recording.

Specifically on the iOS Platform, it is also possible to attach a file of another type through the interface of the corresponding, with the file type, application. In this case, the user firstly activates the preferred application (e.g. Acrobat app), focuses on the file to be attached and selects the "Open in…" action of the "Actions" button. Then, by selecting the ESMobile application's representative icon, a list of the available in ESMobile application screens is displayed. Finally, by focusing on the preferred screen, a list of its detailed entries is displayed, from which the user selects the entry to which they wish to attach the file.



Manage attachment

By focusing on a specific entry of the attachments management screen, the user is redirected to the attachment overview screen, depending on the document type. Here it is also possible to send the document via email or preview it via the interface of another application (e.g. Acrobat application).

An attachment can also be deleted from the attachments management screen. The delete button appears by selecting the attachment to be deleted and drifting to the left. More specifically, for the iOS platform, the middle "Delete" button should have been pressed first.

Note that

Deleting an attachment results in (a) the file being deleted from the device's memos folder and (b) the corresponding entry being deleted from the device's ES00Attachment table. Of course, in case the attachment has been sent to the back office, it must be ensured that it is deleted from the back office.

Settings

Default value

Mobile parameters

Memo_Disable_FolderButton — 0-No

Enable the relevant document selection button from the device photo gallery (0-No) or disable the (1-Yes). Concerns the iOS platform only.

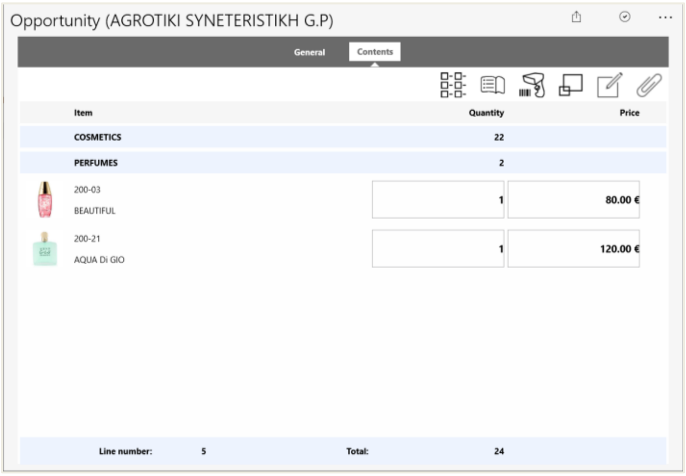
Sales activities

This section describes the ESMobile application actions, that are related directly with the sales, as well as the available tools, for the execution of these actions. Managing the individual sales activities is usually done via the Calendar's dashboard screen, while also allowing the user to manage them via the dashboard screen of the specific customer or point of sales.

Sales opportunity

The activities of type ES.OPP-Sales opportunity meet the need to investigate the customer's potential interest in company products. Using the Calendar dashboard screen, you can both manage an opportunity assigned by the back office to the device user (Log page) and its ad hoc registration .

By selecting the "Opportunity" option of the -Actions button the data entry activity screen appears, with the already person-address populated information, as well as the start date-time, while the user is required to enter a brief description of the topic (General page). In case the opportunity refers to specific items, these are registered using appropriately configured line input buttons (Contents page).



After having registered everything and pressing the -Completed button, the current task is saved while simultaneously changing the status to 0-Open.

By focusing on an already registered opportunity, the user is redirected to its dashboard screen, where they can find information about activities related to it (open tasks, appointments-documents history, etc.). By using the -View button, the current opportunity's data entry screen appears, while by using the -Actions button it is possible to directly perform a series of actions (e.g. add new task or document). Finally, by using the -Attachments button, it is now possible to display the attachments management screen of the opportunity.

Data entry screen

Header

Description	A brief description of the topic. Cannot be empty.
Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the "Planned start" of the task and the "Usual duration" of the task type.
Estimated revenue	Filled-in by the user.
Sales phase	Filled-in by the user. Specifies the opportunity status tracking.
Priority	Filled-in by the user.
Win/loss reason	Filled-in by the user. In the opportunity end phase (successful or unsuccessful) this field cannot be left empty.
Industry	Filled-in by the user.
Actual end	Updates when the task is completed. Cannot modify this field.

Contents	
Item	The catalogue item or warehouse item, for which customer interest is expressed.
Quantity	Records the item quantity.
Value	Records the item value at the current time.

By focusing on a specific task line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad is automatically displayed.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

Group totals	
Quantities & Values	The sum, by grouping field, of the task line's corresponding fields. Using the -Collapse button, it is possible to expand-collapse the groups. Specifically in UWP & Android platforms, it is also possible to focus on the area of a group, in order to expand-collapse a specific group.

General totals	
Quantities & Values	The aggregate sum of the task line's corresponding fields.

Insert line buttons

Adding items to be registered can be done using any one of the available buttons of line insert list type, or using the Barcode button.

Note that by focusing, from a line insert list, on the preferred items and pressing the -Select button, lines are inserted while allowing the user to remain on the list, while by pressing the -Back button the user can insert lines and return to the task's data entry screen.

Button	Comments
	Catalogue items list. Display a list of company catalogue items. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, group, etc.)
	Items list. Display a list of the full inventory items catalogue. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, grouping elements, etc.) In addition to the key elements of the item (image-code-description), information about availability at the current company branch (balance-expected) and the basic sales price of the item is displayed.
	Barcode. Displays the item's barcode scanning area. Detailed instructions on how to set up insert line via the barcode process can be found in section Amendments/ Mobile parameters section of the MOB-ImplementationGuide manual.

Other buttons

For the rest of the buttons of the Opportunity-type screen task entry, the exact same applies as described in the corresponding section of the Measurement type task .

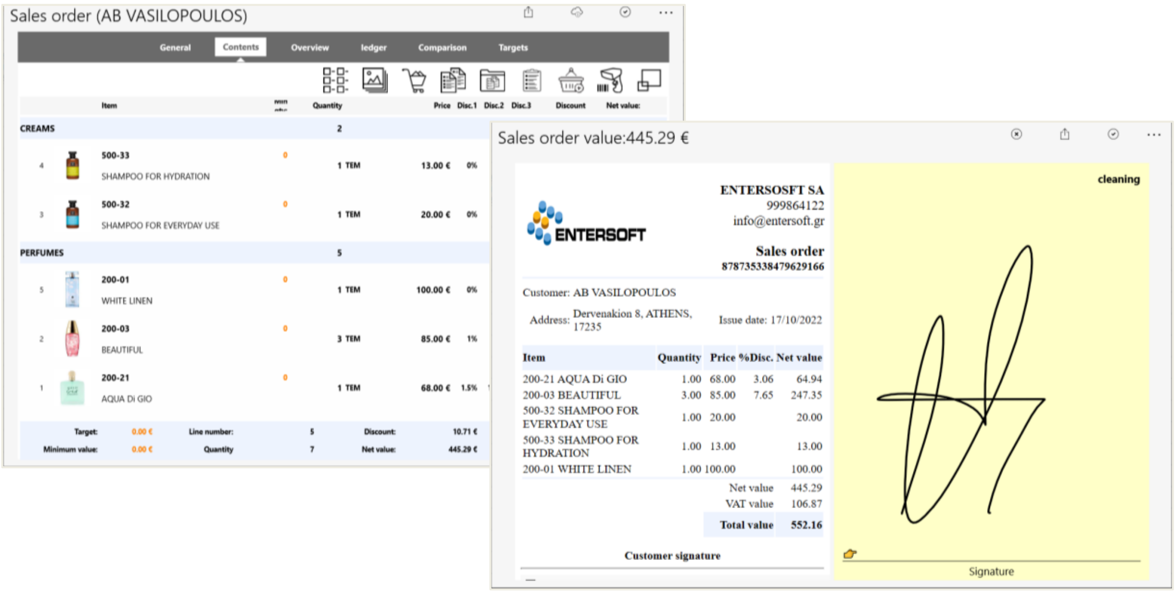
Sales order

The ESMobile app provides the ability to fully manage type 1-Order documents. The device user is responsible for properly filling in and sending the document to the back office, while the back office then undertakes the document checking and further handling. Note that:

- In order to ensure the smooth operation of the send data process, the document identification data entered by the ESMobile application (series-code) should be unique. A key role in ensuring this uniqueness plays the documents series, whose setup process varies, according to whether the ESMobile application is used as a simple saving tool or as a document-issuing tool. Instructions for setting up the document series can be found in section EBS application configuration/ Document types & series of the present manual.
- Type 1-Order documents saved by the ESMobile application are marked as HOLD (Workflow step field). At the same time, in order to separate them from documents saved by the back office, they are marked as MOBILE documents (Dimension-1 field).
- Once a document has been sent to the back office, modifying it is not allowed, using the ESMobile application interface.

By pressing the “Order” option of the Actions-button on the Calendar dashboard screen, the data entry screen of the document appears, with the customer-address information already populated and other key header elements, mainly related to the customer (General page). The user is the one specifying the document items, through appropriately configured insert lines buttons(Contents page). At the same time, and to facilitate the ordering process, the data entry screen of the document allows you to directly access financial information (Overview, Tab pages) or customer statistics (Comparative page).

After having registered everything, pressing the -End button saves the current document. Note that upon saving the document, and if the functionality of signature attachment is activated, the signature screen appears. Saving the signature will automatically attach a signature file to the attachments of the current document.



Settings

Setting	Default value
Company parameters	
Code of order step when has arrived (OrderStateEntered) The workflow step code assigned to a type 1-Order document when it's sent to the back office.	HOLD
Field to documents table where the EMI shows the Source channel (MobileChannelField) The heading field used for to "mark" a document saved by the ESMobile application.	fADDimension1Code
Value which is written to a field of documents table to those occur from mobiles (MobileChannelValue) The value assigned to the heading field, which is used for "marking" a document saved by the ESMobile application.	MOBILE
Mobile parameters - Data entry screen	
Doc_GroupField The document line field used as a line grouping field.	ItemFamilyCode
Doc_AllowZeroLines Allows the saving of a document without lines.	0-No
Doc_AllowZeroQty Allows the saving of a document line & a document analysis line with zero quantity.	0-No
FISequentialDiscounts Implementation method for discounts of the document line. The parameter is set via the "Sales" option of the corresponding company parameter. The available options are: • 0-Cumulatively. Each discount is applied autonomously. • 1-Consecutively. Each discount shall be applied "progressively" on the result of the previous discount.	
Doc_BarcodeSaveField The barcode, used during item selection, is assigned to this document line field.	
OrderPerProductProposal When selecting a note, deletes the document lines referring to an item "outside" of the note.	0-No
Doc_TradeAccountDiscountField The document line field to which the customer discount is assigned. It should be ensured that it is the same as the back office one.	Disc1
Doc_ItemDiscountField The document line field to which the item discount is assigned. It should be ensured that it is the same as the back office one.	Disc2
Doc_AssignDiscount_Field The document line field to which the user discount is assigned. Used by the individual discount assignment procedures (e.g. bulk assignment of discounts).	Disc3
Doc_GiftDiscount_Field The document line field to which the discount is assigned, by using the %-Gift button. It is recommended to match the line field, to which the user discount applies.	Disc3

Doc_AllowEditPrice The user can intervene to the Unit price field of the document line. It is recommended to prohibit the user from intervening to the default application value. Note that by setting the value to 1-Yes, it is also impossible to update the field through the “apply online business policy” process.	0-No
Doc_AllowEditDiscount1 The user can intervene to the % Discount-1 field of the document line. If the field is used to assign a client or item discount, it is recommended to prohibit the user from intervening to the default application value. Note that by setting the value to 1-Yes, it is also impossible to update the field through the “apply online business policy” process.	0-No
Doc_AllowEditDiscount2 The user can intervene to the % Discount-2 field of the document line. If the field is used to assign a client or item discount, it is recommended to prohibit the user from intervening to the default application value. Note that by setting the value to 1-Yes, it is also impossible to update the field through the “apply online business policy” process.	0-No
Doc_AllowEditDiscount3 The user can intervene to the % Discount-3 field of the document line. If the field is used to assign a client or item discount, it is recommended to prohibit the user from intervening to the default application value. Note that by setting the value to 1-Yes, it is also impossible to update the field through the “apply online business policy” process.	1-Yes
Doc_max_refers_to_user_discount The check for exceeding maximum discount based on ordering terms is only performed on the field where the user discount is set (1-Yes), or in all three discount fields of the document line (0-No).	1-Yes
Doc_MaxDiscCheck_Exclude_100 Disables the check for exceeding maximum discount based on ordering terms for 100% discount (1-Yes), or does not disable it (0-No).	0-No
Doc_DimensionalGrid_ShowDescription In the set quantity per color-size screen, the dimension description (1-Yes), or its code (0-No) are displayed.	0-No
Doc_DimensionalGrid_ShowBalance Makes it possible to display, on the set quantity per color-size screen, item availability by dimension. Note that the availability by dimension information is available in the ESMobile application via the "Item balances" process of the "Sync" menu.	1-Yes
NumericKeyboardSizeFactor The size of the numeric keypad screen. Default values from 1.1 to 1.8. Concerns the iOS platform only.	
ModalNumericKeyboard Enables the ability of closing the keypad screen only through the “OK” or “Cancel” buttons. Concerns the iOS platform only.	0-No

Mobile Parameters - Insert lines list

Doc_ItemInvForm_Show_Discs_Price Enable price & discount calculation based on local pricelist, in “insert lines list” type of screens. Works in conjunction with the “Apply pricelist” field of the document type. Note that enabling this feature is likely to result in a certain amount of strain on the response times of the insert lines list.	0-No
Doc_InvestigateItemLimit The number of amounts that corresponds to the "Select all" button of the “insert lines list” type screen.	30
Doc_ItemInvForm_DefaultQty The default quantity that corresponds to the “Select all” button of the “insert lines list” type screen.	1
Doc_UseCatalogueItems	0-No

Enables the list of catalogue items as the first level of the “insert lines list” type screen. Concerns the iOS platform only.

SFList_GroupFieldItem

The field-criterion used to group the data of a list that refers to the entity item. Concerns UWP & Android platforms only.

Advanced settings

Screen display format

Step-by-step instructions on how to set up - at an application customization level - the display format of the document Data entry screen can be found in section Data entry screens/ Master-detail entity (DocForm) of the MOB-ImplementationGuide manual.

Data entry screen

Header	
Customer	The customer of the entry from which document was added. Cannot modify this field.
Address	The default is the address of the entry from which the document was added.
Contact	The default is the contact of the entry from which the document was added.
Delivery address	The default is the address of the entry from which the document was added.
Payment method	The default is the customer's payment method.
Shipping method & Transporter	The defaults are set based on the document's delivery address. More specifically, if there is only one entry in the "Transaction data per address" table, its data is the default, but if there is more than one entry, the default is the data of the entry that has been marked as a "Default transporter" and, if there is no relevant entry, the customer data is the default.
Date	The current date. Cannot modify this field.
Item proposal	In case there is only one "active" note, it is populated automatically, otherwise it is selected by the user. Note that filling in the field results in excluding the items "outside" of the note from the insert lines list. It is possible - via the OrderPerProductProposal parameter - to automatically delete, when changing a note, the already added document lines that refer to an item "outside" of a note.
Sent on	The user fills in the date agreed with the customer.
Branch	The branch that logs in to the application. Cannot modify this field.
Notes	Filled-in by the user.
User defined fields	Filled-in by the user.
Contents	
Item	The inventory item of the document line.
Minimum quantity	The minimum, based on ordering terms, item quantity. If the system detects that the specific limit is not respected upon document saving, a relevant notification message pops up to inform the user. Guidelines for setting up limits are available in section Ordering terms of the present manual.
Quantity	The document line quantity is always expressed in conjunction with the declared measurement unit. The default value is transferred as is from an insert lines list but can be modified. When defining the quantity, an overflow control is activated for it -based on measurement unit- of the allowed number of decimal digits and a relevant user notification message is displayed in the event of a discrepancy.
Measurement unit	The default value is transferred as is from the insert lines list, but the user is able to select any of the alternative measurement units of the item.
Unit price & Discounts	The default price depends on the setting of the "Apply pricelist" field of the document type, but also on whether the system can detect or not -on a local pricelist- a pricelist line, whose dimensions "fit" with the following data: date / company branch / customer & address / item pricing group / current document line item. It is possible - using the appropriate configuration - to prohibit the user from intervening on the default value of these fields. A list of the local pricelist features is provided in section Local pricelist of the present manual.
Discount	The total discount value of the document line. Cannot modify this field.
Net value	The net value of the document line. Cannot modify this field.

By focusing on a specific document line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	Increase & Decrease the line quantity. It is possible - using the appropriate configuration - to set quantity increase & decrease steps. Instructions for setting up the step can be found in section EBS application configuration/ Main entities/ Inventory items of the present manual.
	By focusing on a numerical field of the line, the numeric keypad pops up. In order to facilitate data input, the keyboard includes the up- down arrow buttons which the user can use to move between previous-next lines of a document. In particular, in the case of the Price & % Discount, when moving the amount is also applied. This feature concerns the iOS platform only.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.
	Displays -via an online connection to the back office- the total stock availability of the item. When the line's quantity exceeds the current branch balance, this icon turns red.
	Immediately convert the line into a "gift" by assigning a 100% discount, in the Discount-3 field of the line. It is possible - via parameter Doc_GiftDiscount_Field - to change the default field where the discount is assigned.
	Displays a screen that analyzes the line quantity in the individual item dimensions (color-size). Note that, for the items monitored by dimensions, specifying a quantity per dimension is mandatory. It is possible - via parameter Doc_DimensionalGrid_ShowDescription - to select whether the analysis screen will display the code (0-No), or the dimension description (1-Yes).

Group totals	
Quantities & Values	The sum, by grouping field, of the document line's corresponding fields. Using the -Collapse button, it is possible to expand-collapse the groups. Specifically in UWP & Android platforms, it is also possible to focus on the area of a group, in order to expand-collapse a specific group.
General totals	
Target	In case where a document is submitted in the context of a specific appointment, the target-turnover budgeted for that meeting shall be displayed. Guidelines for assigning a target on an appointment are provided section Budget allocation of the present manual.
Minimum value	The minimum, based on ordering terms, document value. If the system detects that a specific limit is not respected upon document saving, a relevant notification message pops up to inform the user. Guidelines for setting up limits are available in section Ordering terms of the present manual.
Quantities & Values	The aggregate sum of the document line's corresponding fields.

Insert line buttons

Inserting document lines can be done using any one of the available buttons of line insert list type, or using the Barcode button. Note that, by focusing, from a line insert list, on the preferred item and pressing the -Select button, lines are inserted while allowing the user to remain on the list, while by pressing the -Back button the user can insert lines and return to the task's data entry screen.

Button	Comments
	Items list & Photo catalogue. Displays a list with the inventory items catalogue that are actively marked as "Available in document". It is possible - using the appropriate configuration - to limit the items list by other criteria also. Instructions for further limits on the items list can be found section Limit items list of the present manual. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, grouping elements, etc.) In addition to the key elements of the item (image-code-description), the following information is also displayed: • item availability in current company branch (balance-expected) • item sales price, customer discount (% discount-1) and item discount (% discount-2). It is possible - via parameter Doc_ItemInvForm_Show_Discs_Price - to "refresh" this information by focusing on one item, based on the local pricelist data. • quantity & last counting / last sales date. • quantity & measurement unit This information can be viewed by focusing on an item. It is possible - via the field "Measurement unit type" of the document type - to adjust the default measurement unit.
	Range of items. Displays the items sold to the current customer during the period of the last 12 months. This information is derived from the comparative sales data of the local database. With regard to the sort-search and information displayed in the list, the same applies as described above for the "Items list" button.
	Templates. Displays a list of order templates issued by the back office. Only order templates with a valid validity date are available in the list. When inserting document lines, the quantity-measurement unit & price-discount data of the selected template are moved to the corresponding line fields. Note that the discount specified in the template is assigned to the % Discount-2 field of the line, whereas if no discount has been specified, the line discounts are calculated based on a pricelist. Instructions for composing a template order are provided in section Ordering templates of the present manual.
	User templates Displays list of order templates composed by the mobile user. Only open user templates with a valid validity date are available in the list. When inserting document lines, the quantity & measurement unit data of the selected template are moved to the corresponding line fields. Note that the price-discounts of the line are calculated based on a pricelist. Instructions for composing a user template are provided in section Ordering templates of the present manual.
	Documents Displays a list of type 1-Order documents that refer to the current customer. When inserting document lines, the quantity & measurement unit data of the selected document are moved to the corresponding line fields. Note that the price-discounts of the line are calculated based on a pricelist.
	Offer agreements Displays a list of all available offer agreements. Only offer agreements with a valid validity date are available in the list. Instructions for composing an offer agreement are provided in section Offer agreements of the present manual.
	Barcode. Displays the item's barcode scanning area. Detailed instructions on how to set up insert line via the barcode process can be found in section Amendments/ Mobile parameters section of the MOB-ImplementationGuide manual.

Other buttons

The other buttons of the data entry document screen are on default and meet the need for ergonomic display of actions, related to either document management or to obtaining additional information on it. These buttons are only visible if they contain an option.

Button	Comment	
Actions	Displays actions that concern data management for the current document.	
	Action	Comments
	Bulk discount update (%)	Assign a specific discount percentage at the % Discount-3 field of every line. It is possible - via parameter Doc_AssignDiscount_Field - to change the default field where the discount is assigned.
	Save to the back office	Send the information already saved in the document to the back office. Based on this information, an overview of the document is first established, taking into account both the applicable pricing policy (pricelist & discounts), as well as the invoicing policy terms that are met, and then the document is simultaneously saved in the central and local databases. It is possible - via the "Save online" field of the document type - to show or hide the action.
	Apply business policy	Send the information already saved in the document to the back office. Based on this information, an overview of the document is first established, taking into account both the applicable pricing policy (pricelist & discounts), as well as the invoicing policy terms that are met, and then this overview is displayed in a preview screen. It is possible - via the "Online business policy" field of the document type - to show or hide the action. The online business policy features is provided in section Online business policy of the present manual.
	Update item stock	Updates -via an online connection to the back office- the total item availability data. The update applies only to the items included in the document.
	Display counting task	Automatically redirects to the data entry screen of a completed Count task type for the current date, which is mentioned in the customer-point of sales of the current document.
	Undo offers	Bulk delete of the document lines included in an offer agreement.
	E-mail	Auto composes an E-mail with the customer as recipient and a pdf-type file as an attachment, displaying the current document data and the customer signature. It is also possible - using the appropriate configuration - to record text. Detailed instructions on how to set up the Send E-mail process are provided in section Data entry screens/ Master-detail entity/ Advanced functionality/ E-mail screen of the MOB-ImplementGuide manual.
Online	Display reporting via direct connection the back office.	
Save	Save the current document.	
Sort	Alternative sorting criteria for the document lines.	
Layouts	Alternative scenarios for layout configuration of document lines.	

Dashboard screen

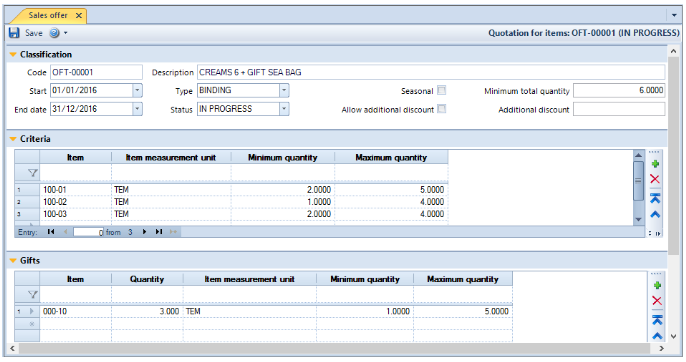
Access to the sales document list is provided via the "Sales" option in the main menu (Actions menu). By focusing on a specific document, the user is redirected to the dashboard screen, where an overview of the document can be viewed (code, date of issue, status, etc.). The -View button redirects the user to its data entry screen, while the -Attachments button redirects to its attachments management screen. Finally, the -Actions button allows the user to directly perform a series of actions on the current document.

Action	Comments
Copy	Automatically creates a 1-Order type document as an exact copy of the selected document.
Do not send	Updates the "Sync status" field to 2-Pending. A detailed description of this functionality is provided in section Pending document of the present manual.
Printing	Triggers the physical printing process of the document. Note that the physical printing of a document requires specific a document type or series. The required settings can be found in section EBS application configuration/ Document types & series of the present manual.
Send via E-mail	Auto composes an E-mail with the customer as recipient and a pdf-type file as an as attachment, displaying the current document data and the customer signature. It is also possible - using the appropriate configuration - to record text. Detailed instructions on how to set up the Send E-mail process are provided in section Data entry screens/ Master-detail entity/ Advanced functionality/ E-mail screen of the MOB-ImplementGuide manual.

Invoicing policy

Offer agreements

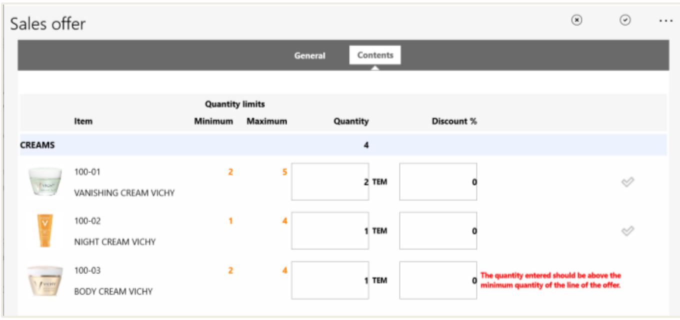
An offer agreement is a promotional sales tool where both the items-gifts, as well as the terms composing the agreement are described.



Create an offer agreement

The offer agreements are composed by the back office via task type ES,OFT-Item offers (menu: Marketing/ Transaction Management/ New). First, the validity period of the agreement is determined, the item-quantity limits that comprise its terms (section Criteria) and the minimum and maximum quantity limits required to secure the offer (Fields: Number-1 & Number-3). The agreement is then determined as a discount percentage (Number-2 field) and, finally, in the it's determined as an item, the offered items-quantities (section Gifts).

Agreement application



By calling the document data entry and pressing the -Offer agreements button, all available offer agreements are displayed. When focusing on a specific agreement, a screen appears with its items and terms.

After entering the quantity per individual item and given that the minimum & maximum total quantity terms are fulfilled, by pressing -Accept button, the items that fulfill the offer's individual quantity limits are inserted into the document. In case the agreement provides a specific gift quantity, when the items have been inserted into the document, a screen with the offered gifts appears. By pressing -Accept button on this screen, the gifts are also inserted. By following the same steps, next offer agreement's items are inserted. The offers already inserted in the current document are excluded from the list of offer agreements.

Note that

All order lines related to offer agreements are not editable. Furthermore, deleting a document line related to an offer agreement is possible only via the option "Cancel rewards" of the -Actions button.

Local pricelist

As mentioned above, the available data in the local pricelist are a subset of the pricing policy data specified in the back office. In particular, out of all the settings of a pricelist, enabled in the local pricelist are:

Application method	Supports pricelists with the value: 0-Simple.
Customer pricing category	In addition to the direct link of a pricelist with a customer (Pricelist field), links via pricing category (Pricing group field) are also supported.
Reference pricelist	Reference pricelists of up to 4 levels are supported. Note that the reference order is of particular importance in the pricelist application process. Based on the reference pricelists standards, the price-discount application process continues until a PRICE pricelist is established (i.e. a pricelist which does not state "% of the base price" but "Price").
Discount assignment	Supports pricelists with the value: 0-Directly on price, 1-Discount 1, 2-Discount 2 and 3-Discount 3. Note that it is also possible to apply a negative discount %.
Discount application method	Supports pricelists with the value: 0-All cascading discounts.
Pricelist line dimensions	The following dimensions are supported: Date / Company branch / Client & Address / Item pricing group or Item / Item MU. At the same time, it is possible to differentiate between price & discount based on quantity.

The default value for fields Unit price and Discounts of the document line depends on the Apply pricelist field setting of the document type, but also on whether the system can detect or not -in a local pricelist- a pricelist line, whose dimensions "fit" with the following data: date / company branch / customer & address / item pricing group / current document line item. The table below shows the default, on a case-by-case basis, value of the Unit price & Discounts field on the document line.

Apply pricelist	Pricelist line exists	MU of pricelist line	Unit price	Discount for Customer - Item	Discount for User
No	-	-	Base price * MU relation	From customer - item	-
Yes	No	-	Base price * MU relation	From customer - item	-
	Yes	<> Line MU	Base price * MU relation	From customer - item	-
		empty	Pricelist price * MU relation or Base price * Pricelist discount % * MU relation	From pricelist	From pricelist
		= Line MU	Pricelist price or Base price * Pricelist discount %	From pricelist	From pricelist

where, Base price is the item price that corresponds to the customer pricing zone

Attention

In the event that the company pricing policy exceeds the limits of the local pricelist, for complete accuracy of the price and discount elements of the document to be issued, it is necessary to obtain these data from the back office (Online business policy). This is possible via the "Apply business policy" or "Save to server" options of the -Actions button on the document screen. Indicative pricing policy cases are the following pricelists:

- by priority
- by item category (combined pricelist)
- by item dimensions (e.g. color-size)

Detailed information on the company's pricing policy tools and features can be found in the EBS application user guide (EBS-UserGuide).

Online business policy

As mentioned above, the available local data is a subset of the business policy data specified in the back office. The online business policy application covers cases that require, when issuing a sales document from the device, absolute accuracy of business policy data.

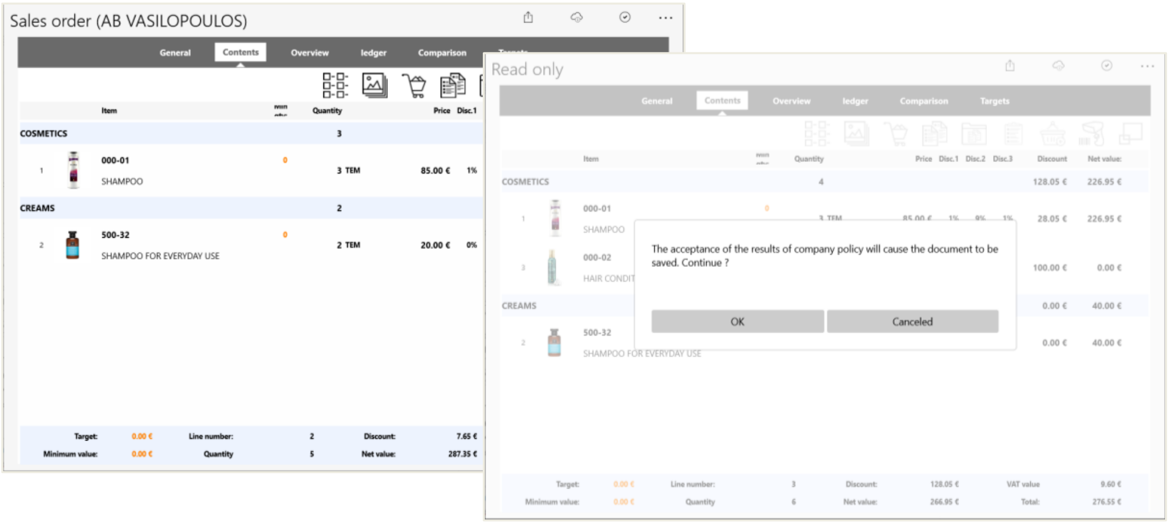
Settings

Settings	Default value
Mobile parameters	
ApplyInvoicePolicy Set the right to call the online business policy application process out of a "wired" communication. Note that the parameter can be configured from the device's "Communication permissions" field.	
Doc_CommercialPolicy_Editable The level of editing control to document elements after acceptance of the online business policy results. The available options are: • 0-Prohibit editing. • 1-Allow editing. It is recommended to avoid using this value. • 2-Allow editing only to apply or cancel offers.	0-Prohibit editing
Advanced settings	
Online business policy / User-defined fields When calling the online business policy process, all named document fields are sent to & received from the server. However, it is possible - at an application customization - to increase this information with the freely defined document fields. Detailed instructions to set up this functionality are provided in section Ideas & Solutions/ Online business policy/ Matching fields of the MOB-ImplementationGuide manual.	
Auto apply online business policy It is possible - via the "Auto application" field of the document type - to automatically call the online business policy application process when saving a document. However, it is also possible - at an application customization level - to either refine the auto application at a point of sales level, or to apply it automatically under conditions. Detailed instructions to set up this functionality are provided in section Ideas & Solutions/ Online business policy/ Auto application of the MOB-ImplementationGuide manual.	

By going to the sales document data entry screen and calling the Apply business policy option of -Actions button, it is possible to activate -via an online connection to the server- the business policy that has been agreed with the customer. Firstly, the already saved in the document information is send to the server where, based on it, a document overview is formed by enforcing both the pricing policy (pricelist & discounts) and the commercial policy's "fulfilled" terms. At the next step, the document's overall view is sent from the back-office to the device and is displayed on a preview screen. It should be noted here, that the full process also manages the following special cases:

- Composite item. In case the local document contains a composite item (set or produced), applying the online business policy results to the expansion of the item's main BOM.
- Adjunct item. In case the document contains an item accompanied by an adjunct (e.g. bailment good), applying the business policy also results in the insertion of the adjunct item, taking into account the elements of their "quantity ratio".

Finally, by pressing the -Save button of the document preview screen, it is possible to accept or cancel the business policy results. Clicking on "Accept" results in the document elements being matched to those of the preview screen and signals the completion of the document issue process, by subsequently prohibiting any user intervention to it, while selecting "Cancel" will close the preview screen and simply return to the data entry document screen.



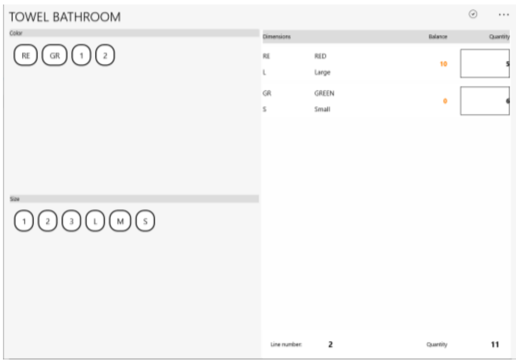
Attention

- In order to be able to assign a customer & item discount via the online business policy, the mobile parameters concerning intervention to these fields must be set at 0-No. For example, if the customer & item discount is assigned to the Discount-1 & Discount-2 fields of the line, mobile parameters Doc_AllowEditDiscount1 & Doc_AllowEditDiscount2 must be set at 0-No.
- For a document where the results of the online business policy have been accepted, the data delivery process sends the local document price-discount to the server, even if the value 0-No is assigned to the “Send values” field of the document type.

Item with color-size

As mentioned above, for items monitored in dimensions, specifying a quantity per dimension is mandatory. At the same time, consistency between line quantity and analysis quantity per dimension is required. If any discrepancy is detected when the document is being saved, the saving process fails and a relevant error message appears.

Pressing the -Dimensions button of the document line displays a screen with the color-size display where the item is monitored. The quantity analysis by dimension is performed by selecting color-size combinations and specifying the preferred quantity by combination. When completing this process and by pressing the -Back button, the quantity analysis is imported and the user is redirected to the data entry screen of the document.



Alternatively, by pressing the -Barcode button on the data entry screen of the document, it is also possible to enter an item-dimension at the same time via barcode. This process varies according to the information provided by the specified barcode.

- Barcode item. In case the barcode only refers to an item, when specifying it an analysis screen in color-size is displayed.
- Barcode item-dimensions. In case the barcode refers to a color-size, specifying the barcode automatically selects an item-dimensions and inserts a line & document analysis line. If the barcode also refers to quantity, the barcode quantity is also automatically assigned.

Settings

Default value

Mobile parameters

Parameter	Default value
Doc_DimensionalGrid_ShowDescription In the set quantity per color-size screen, the dimension description (1-Yes), or its code (0-No) are displayed.	0-No
Doc_DimensionalGrid_ShowBalance Makes it possible to display, on the set quantity per color-size screen, item availability by dimension.	1-Yes

Sentiment management

Sortiment is a packaging measurement unit that serves as a tool to automatically split the sales quantity to predetermined quantities per color-size. This feature concerns the iOS platform only.

Note that

- The ability to specify a sortiment quantity is only available by using the line insertion button -Photo gallery.
- Based on the product implementation of the ESMobile application, the sortiment quantity information is not sent to back office via the data synchronization process.

Sortiment configuration

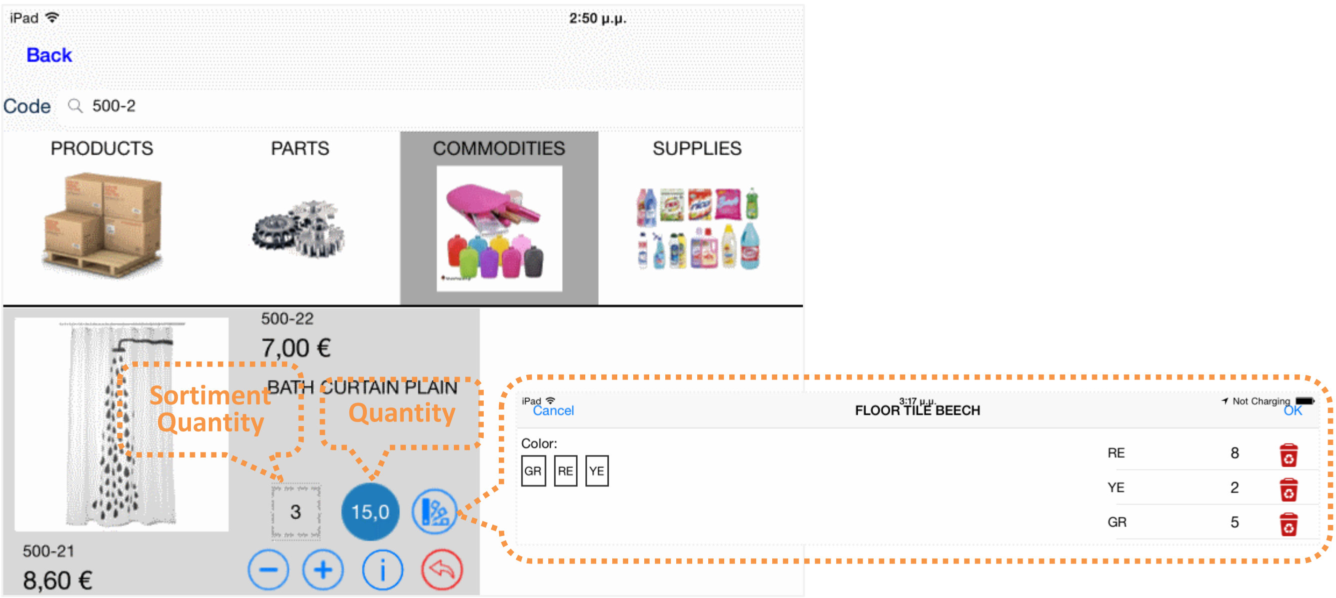
Sortiment configuration is available in the back office by using a sortiment-type packaging measurement unit (menu: Tools & Configuration/ Customization/ Inventory items). The following settings are required:

- Define a sortiment-type packaging measurement unit. Besides the sortiment code and description, specifying a corresponding measurement unit and the appropriate dimension charts is required. Furthermore, in the sortiment lines area, specifying the default quantities per dimension is required.
- Specify the measurement unit that relates to the sortiment as an alternative measurement unit with a “1 to 1” relation to the base measurement unit.
- Specify, in the item control policy, an item of a control policy where the default sales measurement unit is the measurement unit that relates to the sortiment.
- Set the device document type as a measurement unit type. This is done in order for the measurement unit that related to the sortiment to be set as default when saving a document from the device.

Sortiment execution

When focusing on an item with a sortiment, from the photo gallery of the document’s data entry screen, the sortiment quantity can be specified by the user. This quantity is automatically split, based on the sortiment quantities, to the default quantity per color-size, but without preventing the user to modify this suggestion.

Specifying the sortiment quantity is possible by using the increase-decrease quantity buttons, while modifying the default quantities per dimension is possible via the -Dimensions button.



Ordering tools

Ordering terms

Ordering terms is a tool where various quantity-value checks regarding the order to be saved are described. These terms are compiled in the back-office, by appropriately configuring the following task types.

Order checks

Ordering checks concern checks on the quantity or value of the current order. They can be defined in the back office using the ES.OCH-Order check task type (menu: Marketing/ Transaction Management/ New). The task details determine the duration of the checks and their preferred rules.

The check performed at a document level (Check minimum value section) may be for all customers or a particular customer/point of sales. Accordingly, the checks performed at a document line level (sections Check minimum quantity & Check maximum discount) may be for all items or specific items-item groups, providing also the option to refine the checks into a specific resource-device user level. Tasks with a validity date within the current date are available on the individual devices.

Transaction limits

Transaction limits relate to checks on the quantity or value of the current order, taking also into account past transaction data. They can be defined in the back office using the ES.TRNQ-Transaction limits task type (menu: Marketing/ Transaction Management/ New). The task details determine the validity duration of the limits and their preferred rules. The size (Calculation index field) and base (Calculation level field) of the limit to be formed are first specified, as well as the transactions types for which the check is activated (About transactions field). The preferred limits (section: Results) are then specified, that may be relevant to customers regardless of item (Calculation level 1-Customer), or to a specific customer-item combination (Calculation level 2-Customer-item).

A prerequisite for the checks activation is to assign the resource-user that the limits concern, as well as the how the checks shall function for the rest of the resources-users (field: Application rule) Selecting option 1-Inclusive, means that the unspecified resources-users work without limits, while selecting option 2-Exclusive means that the unspecified users work with zero limit. Tasks with a validity date within the current date are available on the individual devices.

A preview of the Ordering terms that apply to the current period is available at the sub-options in the “Order checks” menu.

- Prohibit items. Information about the items that have been marked as unavailable in the inserts line list.
- Items by point of sale. Information on items that participate in the insert lines list of a particular point of sales.
- Saving checks. The checks that apply to the quantity-value-discount of the order to be issued.
- Limits & Exclusive transaction limits. The checks that apply to the total quantity-value, at a company group level.

Items list reduction

It is possible to set rules in order to “dynamically” limit the items of an insert lines list, based on elements such as calendarization, customer, or even the user-resource of a device. In order to utilize this feature, the user must configure the following task types.

Sales ban

Specifying the items that are banned from sales can be done in the back office, via task type ES.OCH-Order check (menu: Marketing/ Transactions management/ New). The task details determine the validity duration of the ban and the items-item groups to be excluded, while also offering the possibility to refine the excluded items on a device resource-user level. Tasks with a validity date within the current date are available on the individual devices.

Proposal note

The rules of the product proposal note are specified in the back office via task type ES.PPRL-Order product proposal (menu: Marketing/ Transactions management/ New). The task details determine the validity duration of the note and the items included, while also offering the possibility of temporarily excluding an item, by changing its status to “Canceled”. Tasks with a validity date within the current date are available on the individual devices. It should be noted, that in order to activate the insert lines list restriction, based on a proposal note, this also needs to be configured in the document type (Restriction from note field).

Point of sales

Specifying the items available to be selected related to a specific point of sales can be done in the back office via task type ES.PRL-POS Association (menu: Marketing/ Transactions management/ New). The task details determine the point of sales and the items-item groups to be selected, while also offering giving the ability to refine this list on a device resource-user level. All the tasks that contain items "assigned" to the device resource-user are available on the individual devices.

Technical information

Based on the product implementation of the ESMobile application, the ability to restrict the insert lines list is disabled. In order to activate it - at an application customization level - the user must proceed with the following modifications to the command that concerns each insert lines list (e.g. ItemInvFormSF command)

- Transfer the inquiry from the ItemInvFormQR stand-alone file to the BaseSelect attribute of the command.
- Specify the PPRLExtra command in the ExtraCommand property of the command.

Sales ordering templates

The ordering templates is a tool of bulk line insertion that can be used to facilitate the sales ordering process. Creating generic templates that apply to all device users can be done in the back office, while the mobile user can also create additional templates that may serve their personal needs.

Template order

Creating a template order can be done by the back office and via task type ES.ORDERTMPL-Template order (menu: Marketing/ Merchandise/ New activity). The template details determine the start date of validity, its attributes (Category 1 & 2 field), as well as the default items-quantities & prices-discounts to be inserted in the order (Items section). It should be reminded here, that the template orders can be accessed via -Templates button of the document data entry screen.

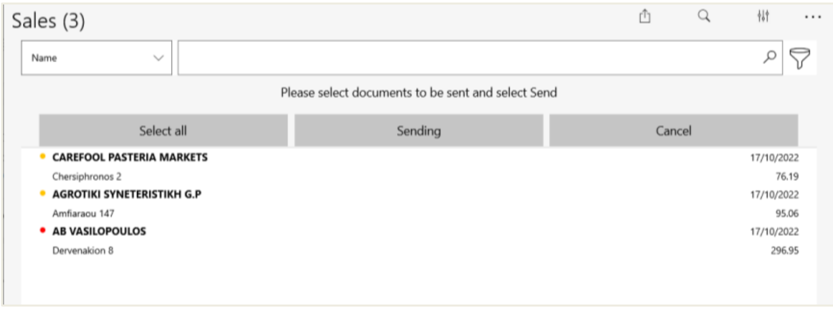
User template

User templates are compiled from the User order template option of the ESMobile application main menu (menu: My Tools / New). The individual elements of the template define the template description, its period of validity and, in case the template is specific to a particular customer, its identification details (General page). Then, the default items-quantities to be inserted into the order are specified (Contents page). It should be reminded here, that the user templates can be accessed via the -User templates button of the document data entry screen.

Pending order

By marking a document's status as 2-Pending, it is possible to exclude it from the process of sending data to the server. Marking a document as "Pending" is possible by calling the preferred one from the documents list and selecting the "Do not send" option of the -Actions button, while restoring its 0-Local status is done automatically, by pressing the -Completed button of the document data entry screen.

Direct reporting for pending documents concerning the data synchronization process, whether they are in a 0-Local or 2-Pending state, is provided via the Sales screen of the main menu and by pressing the -Not synchronized button. It should be noted here, that using this button requires a connection to the back office. From this screen and via the -Actions button, selective delivery of data is possible. By selecting the preferred documents and pressing the "Send" button, the process of sending data is activated only for the selected documents.



Attention

When performing the data initialization process and provided that a document with status 2-Pending is found, a relevant warning message shall be displayed, acceptance of which will result in the permanent loss of that document. If the user does not wish to permanently lose the document, they must ensure that the document status is restored to 0-local, before the initialization procedure is performed.

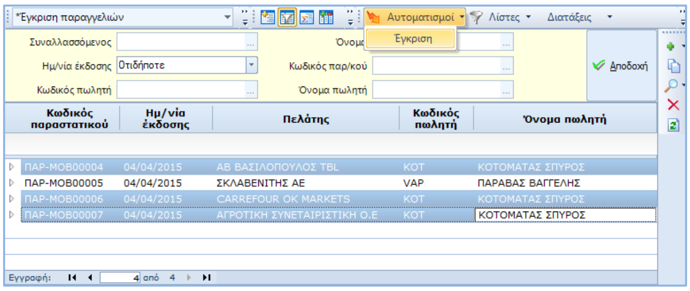
Technical information

The status of a document, when it comes to the data synchronization process, is reflected in the Record State field of the document header. The possible statuses are:

- 0-Local (). The document is stored only on the local database. It can be sent to the back office via the data synchronization process.
- 1-Central. The document is stored on the central & local database. It is excluded from the data synchronization process.
- 2-Pending (). The document is stored only on the local database. It is excluded from the data synchronization process.
- 3-Temporary (). The document is stored only on the local database. It is excluded from the data synchronization process. Concerns a specialized functionality and it is recommended to be used only in installations where the number of lines per document is usually very large. By enabling this feature, each time a document line is inserted, the document view is saved with a status of 3-Temporary. In the end of the process, pressing the save document button automatically changes its status to 0-Local. This feature can be enabled by assigning the 1-Yes value to the Doc_SavePerLine mobile parameter. Note that this feature cannot be enabled in documents where the document series has been entered.

Order approval

Calling the Order approval (menu: Sales/ Mobile devices) option from the back office displays the list of orders to be approved saved by the ESMobile app. Once the necessary verification of their data is complete, the preferred orders can be selected and the approval process shall be called. This results in the orders' workflow step to change from HOLD to OK.



Quotation

The ESMobile app makes it possible to fully manage documents of 0-Quotation type. The device user is responsible for properly filling in and sending the document to the back office, while the back office then undertakes the document checking and further handling. Note that:

- In order to ensure the smooth operation of the send data process, the document identification data entered by the ESMobile application (series-code) should be unique. A key role in ensuring this uniqueness plays the documents series, whose setup process varies, according to whether the ESMobile application is used as a simple saving tool or as a document-issuing tool. Instructions for setting up the document series can be found in section EBS application configuration/ Document types & series of the present manual.
- Once a document has been sent to the back office, modifying it is not allowed, using the ESMobile application interface.

Regarding the management of a quotation document, the same applies as described for an Order document type.

Sales return

The ESMobile app makes it possible to fully manage documents of 2-Return type. The device user is responsible for properly filling in and sending the document to the back office, while the back office then undertakes the document checking and further handling. Note that:

- Since the return documents handle stock movements, it is mandatory that the ESMobile application specifies a documents series. Instructions for setting up the document series can be found in section EBS application configuration/ Document types & series of the present manual.
- Once a document has been sent to the back office, modifying it is not allowed, using the ESMobile application interface.

Regarding the management of a return document, the same applies as described for an Order document type.

Merchandizing activities

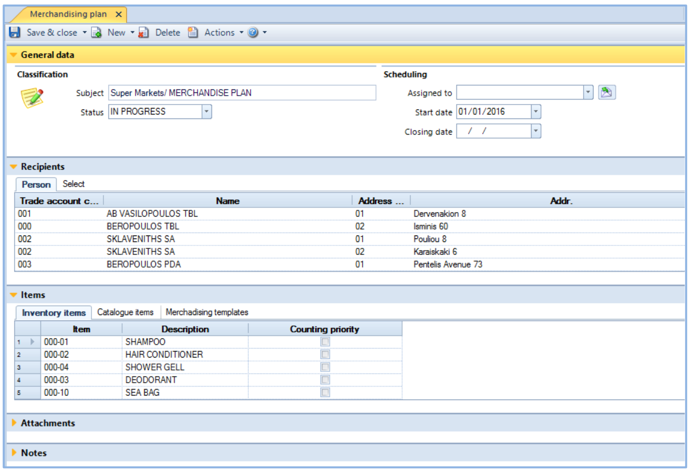
This section describes the ESMobile application tasks that concern supportive and promotional sales activities. Managing the individual merchandizing activities is usually possible via the Calendar dashboard screen, while also allowing the user to manage them via the dashboard screen of a customer or point of sales.

Company presence or competition presence

Taking inventory of company products that can be found in customer sites is possible by using the Count & Pricing tasks to record quantity-price and Shelf share to record presence %, while taking inventory of the presence of competition products is possible by using the Competition and Pricing tasks to record quantity-price, respectively.

Merchandizing plan

Task types ES.MCH-Count & ES.MCHCP-Pricing are usually performed based on a predefined plan, while the mobile user also has the ability to perform ad hoc counting of them. Creating a plan can be done in the back office via task type ES.MCHPL-Merchandising plan (menu: Marketing/ Merchandise/ New activity). The plan details determine the start date of the counting process, the points of sale to participate in the process (section: Business addresses) and the items to be counted (sections: Counting items & Pricing items), which can be selected from either catalogue items or inventory items. Note that in order to facilitate the plan creation process, it is possible to:



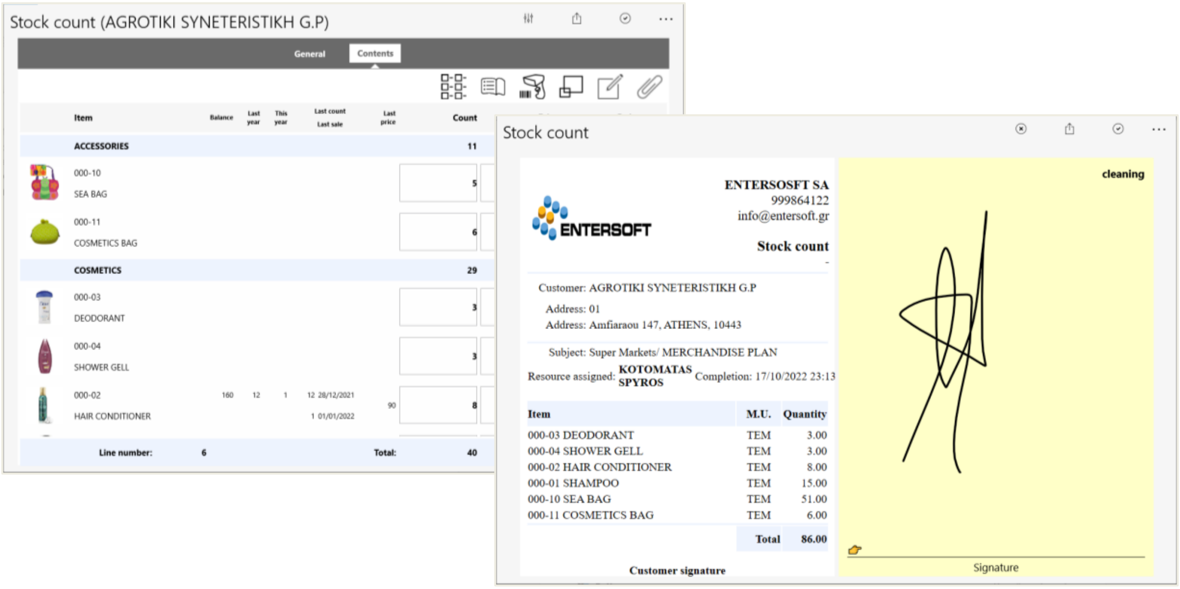
- Automatically update the items list to be counted with the option select from templates. Utilize this feature by activating the preferred templates, from the list of available templates (section: Merchandising templates) and pressing the "Select" button.
- Populate the value of fields Category, Views, Quantity & Priority for counting items and the value of fields Price & Discounted for pricing items.

Product counting

It is possible to access the merchandizing plans to be executed via the Calendar dashboard screen (page: General-Planned actions). By selecting a specific plan here and pressing the -Count button, the new counting entry screen appears. Furthermore, via the option "Counting" of the -Actions button, it is possible to perform ad hoc counting.

By calling the counting task, regardless of where in the application it will be called, the data entry screen will appear, with the customer-address data, as well as the start date-time data already populated (General page). Specifically in case the activity is performed within the context of a specific plan, the items to be counted are also entered (Contents page), but the user is also allowed, via the appropriately configured line input buttons, to add additional items.

At the end of this process, and by pressing the ✓-Completed button, the current task is saved while simultaneously selecting whether to change its status to completed. Note that upon saving the document, and provided that the functionality of signature attachment is activated, the signature screen appears. Saving the signature will automatically attach a signature file to the attachments of the current activity.



Settings

Default value

Mobile parameters

Task_BarcodeSaveField

The task line field where the barcode, used during item selection, is assigned.

Task_SavePerLine — Default value: 0-No

Enables the option to save an activity as "temporary" (RecordState 3), each time a new line is inserted. Concerns a specialized functionality and it is recommended to be used only in installations where the number of activity lines is usually very large. Note that "temporary" activities are excluded from the data synchronization process.

Advanced settings

Screen display format

Step-by-step instructions on how to set up - at an application customization level - the display format of the activity Data entry screen can be found in section Data entry screens/ Master-detail entity (DocForm) of the MOB-ImplementationGuide manual.

Data entry screen

Header

Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the “Planned start” of the task and the “Usual duration” of the task type.
Plan	Updates, in case of counting via a merchandizing plan, with the relevant plan. Cannot modify this field.
Status	Updates when the activity is saved. Cannot modify this field.
Actual end	Updates when the task is completed. Cannot modify this field.

Contents

Item	The catalogue item or warehouse item, where logging occurs.
Balance	The total item stock. The information comes from item statistics.
Last year	The total sales of the previous year for this item and point of sales. The information comes from item statistics.
This year	The total sales of the current year for this item and point of sales. The information comes from item statistics.
Last counting	The quantity & date of the last counting for this item and point of sales. The information comes from item statistics.
Last sale	The quantity & date of the last sale for this item and point of sales. The information comes from item statistics.
Last price	The last sale price for this item and point of sales. The information comes from item statistics.
Product counting	Record the counting amount.
Value	Records the item value at the current time.
Sales order	Record the quantity to be ordered. In case an order creation based on counting is selected, it is transferred to the corresponding line of the automatically generated order.

By focusing on a specific task line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad pops up.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

Group totals

Quantities	The sum, by grouping field, of the task line's corresponding fields. Using the -Collapse button, it is possible to expand-collapse the groups. Specifically in UWP & Android platforms, it is also possible to focus on the area of a group, in order to expand-collapse a specific group.

General totals

Quantities	The aggregate sum of the task line’s corresponding fields.

Insert line buttons

Inserting an activity line is possible by using any one of the available buttons of insert lines list type, or by using the Barcode button. Note that by focusing, from a line insert list, on the preferred items and pressing the -Select button, lines are inserted while allowing the user to remain on the list, while by pressing the -Back button the user can insert lines and return to the task's data entry screen.

Button	Comments
	Catalogue items list. Display a list of company catalogue items. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, group, etc.)
	Items list. Display a list of the full inventory items catalogue. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, grouping elements, etc.) In addition to the key elements of the item (image-code-description), information about availability at the current company branch (balance-expected) and the basic sales price of the item is displayed.
	Barcode. Displays the item's barcode scanning area. Detailed instructions on how to set up insert line via the barcode process can be found in section Amendments/ Mobile parameters section of the MOB-ImplementationGuide manual.

Other buttons

The other buttons of the data entry document screen are default and meet the need for ergonomic display of actions, related to either activity management or obtaining additional information on it. These buttons are only visible if they contain an option.

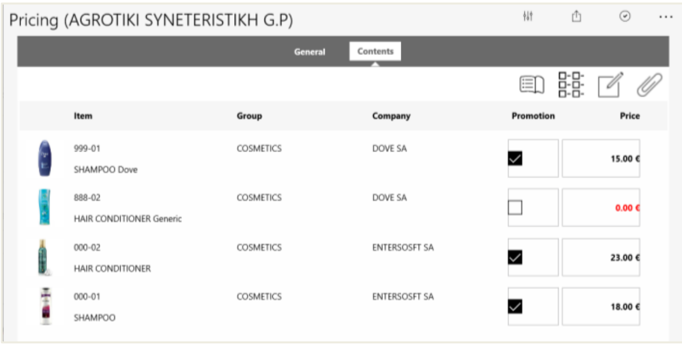
	Button	Comment
	Actions	Displays actions that concern data management for the current activity. Action: Activity e-mail Comments: Auto composes an E-mail with the customer as recipient and a pdf-type file as an as attachment, displaying the current activity data and the customer signature. It is also possible - using the appropriate configuration - to record text. Detailed instructions on how to set up the Send E-mail process are provided in section Data entry screens/ Master-detail entity/ Advanced functionality/ E-mail screen of the MOB-ImplementGuide manual.
	Online	Display reporting via direct connection the back office.
	Save	Saves the current activity, making it possible to change its status at the same time. The available save options can be set in the corresponding activity type field.
	Attachments	Redirects to the management screen for the current activity attachments.
	Sort	Alternative sorting criteria for the activity lines.
	Layouts	Alternative scenarios for layout configuration of the activity lines.

Order auto generation

In case Create document is selected upon activity completion, the process to register a new 1-Order type document, with pre-populated items & quantities, is activated. Note that, out of all the counting items, the order only includes those for which a specific quantity to be ordered has been set.

Price monitoring

It is possible to access the merchandizing plans to be executed via the Calendar dashboard screen (page: General-Planned actions).



By selecting a specific plan here and pressing the -Pricing button, the new pricing entry screen appears. Furthermore, via the option "Pricing" of the -Actions button, it is possible to perform ad hoc pricing.

By calling the pricing task, regardless of where in the application it will be called, the data entry screen will appear, with the customer-address data, as well as the start date-time data already populated (General page). Specifically in case the activity is performed within the context of a specific plan, the items to be counted are also entered (Contents page), but the user is also allowed, via the appropriately configured line input buttons, to add additional items.

At the end of this process, and by pressing the -Completed button, the current task is saved while simultaneously selecting whether to change its status to completed. Note that upon saving the document, and provided that the functionality of signature attachment is activated, the signature screen appears. Saving the signature will automatically attach a signature file to the attachments of the current activity.

Settings

Default value

Mobile parameters

Task_SavePerLine — 0-No

Enables the option to save an activity as "temporary" (RecordState 3), each time a new line is inserted. Concerns a specialized functionality and it is recommended to be used only in installations where the number of activity lines is usually very large. Note that "temporary" activities are excluded from the data synchronization process.

Advanced settings

Screen display format

Step-by-step instructions on how to set up - at an application customization level - the display format of the activity Data entry screen can be found in section Data entry screens/ Master-detail entity (DocForm) of the MOB-ImplementationGuide manual.

Data entry screen

Header

Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the “Planned start” of the task and the “Usual duration” of the task type.
Status	Updates when the activity is saved. Cannot modify this field.
Actual end	Updates when the task is completed. Cannot modify this field.

Contents

Item	The catalogue item or warehouse item, where logging occurs.
Group	The item group that corresponds to the line item.
Company	The company that handles the line item. Only concerns lines with a catalogue item.
Discounted	Highlights that the line item is in discount.
Value	Records the item value at the current time. This field cannot be empty. When the activity is saved, and in case there are items with a zero value, a prohibitive message appears.

By focusing on a specific task line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad pops up.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

Insert line buttons

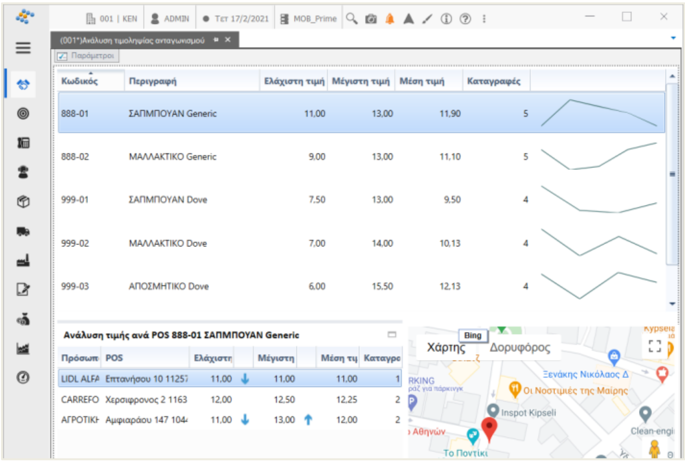
Inserting an activity line is possible by using any one of the available buttons of insert lines list type. Note that by focusing, from a line insert list, on the preferred items and pressing the -Select button, lines are inserted while allowing the user to remain on the list, while by pressing the -Back button the user can insert lines and return to the task's data entry screen.

Button	Comments
	Catalogue items list. Displays a list with the catalogue items of the company & the competition. The list is sorted alphabetically by item description, while also allowing sorting by other details (code, group, company). In order to limit the list to competition items, it is sufficient to select “Yes” at the “Competition item” criterion, while it is possible to search for a specific item either by code or by other identification details (description, group, company). In addition to the main item details (image-code-description-group), the information concerning the company that handles the item is also shown.
	Items list. Display a list of the full inventory items catalogue. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, grouping elements, etc.) In addition to the key elements of the item (image-code-description), information about availability at the current company branch (balance-expected) and the basic sales price of the item is displayed.

Other buttons

For the rest of the buttons on the data entry screen of Pricing type, the exact same applies as described in the corresponding section of the Counting activity type.

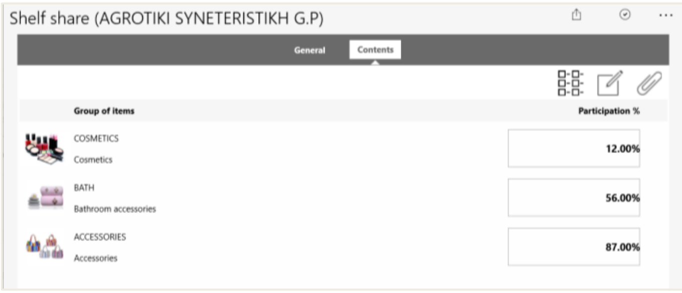
Pricing analysis



The pricing analysis reports (menu: Marketing/ Merchandise) provide an overview of pricing data for company & competition items respectively. In particular, information shall be provided on the maximum-minimum-average value but also on the price variation trend over the data analysis period. By focusing on a specific item, a list of the points of sales that participate in forming the analysis is displayed.

Shelf share

ES.SHELFSHARE-Shelf share type activities are ad hoc activities that are typically registered through the Calendar dashboard screen. They are used to record the presence % of the company's products at an Item group level.



By selecting the "Shelf share" option of the -Actions button, the data entry screen appears, with the customer-address details and the start date-time already populated (General page), while the counting details (Contents page) can also be entered by the user by using an appropriately configured insert lines button.

At the end of this process, and by pressing the -Completed button, the current task is saved while simultaneously selecting whether to change its the status completed.

Settings

Default value

Mobile parameters

Task_mch_ShelfShareCategory — Default value: 2-Category

The item grouping field where logging occurs. The available options are: 0-Family, 1-Group, 2-Category and 3-Subcategory.

Advanced settings

Screen display format

Step-by-step instructions on how to set up - at an application customization level - the display format of the activity Data entry screen can be found in section Data entry screens/ Master-detail entity (DocForm) of the MOB-ImplementationGuide manual.

Data entry screen

Header	
Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the “Planned start” of the task and the “Usual duration” of the task type.
Status	Updates when the activity is saved. Cannot modify this field.
Actual end	Updates when the task is completed. Cannot modify this field.
Contents	
Group	The item grouping field where logging occurs.
Participation %	Records the Participation % at the current time.

By focusing on a specific task line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad pops up.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

Insert line buttons

Inserting an activity line is possible by using any one of the available buttons of insert lines list type. Note that by focusing, from a line insert list, on the preferred groups and pressing the -Select button, lines are inserted whilst remaining on the list, while by pressing the -Back button lines are inserted and the user is redirected to the activity's data entry screen.

Button	Comments
	Item groups list. Displays a list of the grouping field entries, where we want the participation % recording to occur.

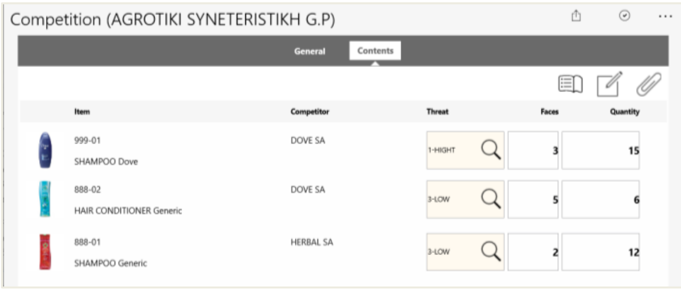
Other buttons

For the rest of the buttons on the data entry screen of the Shelf share activity type, the exact same applies as described in the corresponding section of the Counting activity type.

Competition

ES.COMPT-Competition type activities are ad hoc activities that are typically registered through the Calendar dashboard screen. They are used to record data on the presence of competition products in the company's customer sites.

By selecting the "Competition" option of the -Actions button, the data entry screen appears, with the customer-address details and the start date-time already populated (General page), while the counting details (Contents page) can also be entered by the user by using an appropriately configured insert lines button.



At the end of this process, and by pressing the -Completed button, the current task is saved while simultaneously selecting whether to change its the status completed.

Data entry screen

Header	
Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the “Planned start” of the task and the “Usual duration” of the task type.
Status	Updates when the activity is saved. Cannot modify this field.
Actual end	Updates when the task is completed. Cannot modify this field.
Contents	
Item	The catalogue item, where logging occurs.
Competition	The competitor for which the registration is performed.
Threat	Records the user estimate of the threat size.
Views	Records the number of views detected.
Quantity	Records the quantity detected.

By focusing on a specific task line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad pops up.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

Group totals	
Quantities	The sum, by grouping field, of the task line's corresponding fields. Using the -Collapse button, it is possible to expand-collapse the groups. Specifically in UWP & Android platforms, it is also possible to focus on the area of a group, in order to expand-collapse a specific group.
General totals	
Quantities	The aggregate sum of the task line’s corresponding fields.

Insert line buttons

Inserting an activity line is possible by using any one of the available buttons of insert lines list type. Note that by focusing, from a line insert list, on the preferred groups and pressing the ✓-Select button, lines are inserted whilst remaining on the list, while by pressing the ←-Back button lines are inserted and the user is redirected to the activity's data entry screen.

Button	Comments
	Catalogue items list. Displays a list of catalogue items that have been designated as "Competition product" or as a "Own and Competition product". The list is sorted alphabetically by item description, while also allowing sorting by other details (code, competitor). Searching for a specific item can be done either by code, or other identification data (description, group, etc.) In addition to the main item details (image-code-description-group), the information concerning the item group & competitor.

Other buttons

For the rest of the buttons on the data entry screen of Competition activity type, the exact same applies as described in the corresponding section of the Counting activity type.

Promotional material

Recording activities related to promotional material management is possible via the actions of the ES.INST-Installation activity type, upon material delivery and of the ES.DEINST-DeInstallation upon material withdrawal. The installation or deinstallation activities to be implemented by the mobile user are always based on a predefined plan.

Installation plan

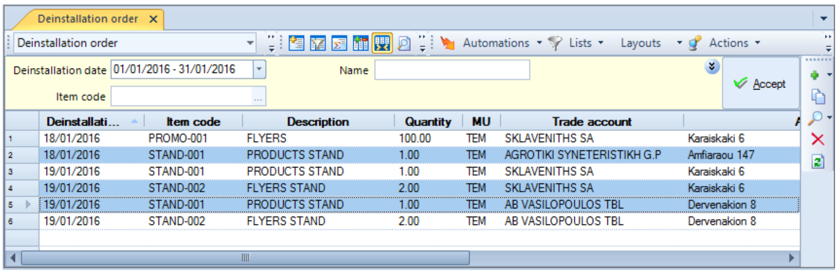
Creating an installation plan is possible from the back office via task type ES.INSTPLAN-Installation plan (menu: Marketing/ Merchandise/ New activity). The individual plan details determine the start date of the installation process, the points of sales to be involved in the process (section: Recipients), as well as the detailed data (quantity & planned deinstallation date) of the material to be installed (section: Items).

When the installation plan creation is completed, and in order to turn it into specific installation tasks, the Create plan process must be performed, which results in the creation of a new installation activity per plan recipient.

Deinstallation order

The materials withdrawal planning process is implemented in the back office via the ES.DeInst-DEINSTALLATION activity type.

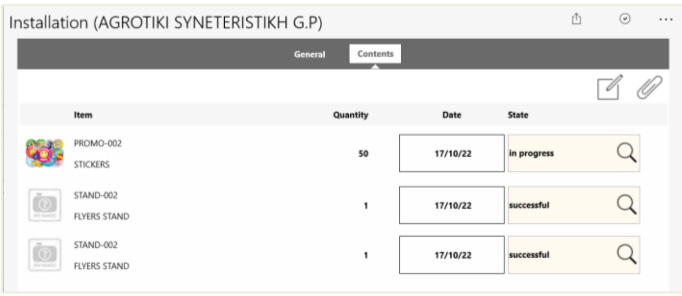
Selecting the Deinstallation order option (menu: Marketing/ Merchandise/ Reports) displays a list of the material to uninstall. From this list the user initially selects the preferred entries and then performs the Create de-installation process. This process results to the creation of a new de-installation activity -per assignment resource- of all entries selected by the user, which refer to the same point of sales and have a common de-installation date. Note that the material to be de-installed are the de-installation activity lines in a "completed" state and with their de-installation date filled in.



Installation

It is possible to access the installation activities to be executed via the Calendar dashboard screen (page: General-Open tasks).

Selecting this activity displays the task data entry screen with the customer-address information and the start date-time already populated(General page). The items to be installed (Contents page) are also populated, without allowing the user to add or remove items. The user simply needs to enter, for each one of the items, the planned de-installation Date and installation Status details.



At the end of this process, and by pressing the -Completed button, the current task is saved while simultaneously selecting whether to change its the status completed.

Deinstallation

It is possible to access the de-installation activities to be executed via the Calendar dashboard screen (page: General-Open tasks).

Selecting this activity displays the task data entry screen with the customer-address information and the start date-time already populated(General page). The items to be de-installed (Contents page) are also populated, without allowing the user to add or remove items. The user simply needs to enter, for each one of the items, the de-installation Status.

At the end of this process, and by pressing the -Completed button, the current task is saved while simultaneously selecting whether to change its the status completed.

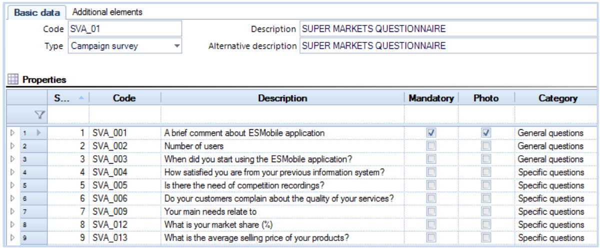
Questionnaire

The questionnaires are used as a tool to collect "predefined" information from company customers or anonymous third parties. The questionnaire is usually part of a pre-defined campaign for market research, while the mobile user is allowed to perform ad hoc data collections.

Inquiries

The questionnaire is composed from the back office, using the Property group entity (menu: Configuration/ Field customization/ Additional properties/ Property groups).

The questionnaire may contain questions of various types (free text, date, number, multiple choice, etc.) for which, in addition to the description and type info, some special features can be set up, such as:



- Mandatory. Filling in this inquiry is mandatory.
- Default value. The default value for answering the inquiry
- Photo. Ability to attach a photo to the inquiry Note that this functionality is not available for "Multiple value list" type inquiries, nor to inquiries with a predefined "Default value".

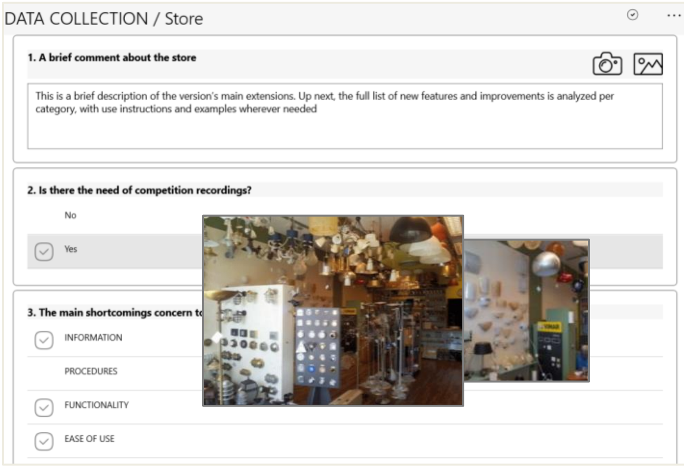
Market research campaign

Compiling a market research campaign is possible from the back office via the ES.CMP-Campaign task type (menu: Marketing/ New). The campaign details determine the start & end date of the campaign, the questionnaire to be filled in (section: Information) and, in the case of the targeted campaign, the point of sales to be involved in the process (field: Recipients list or Comment-10). Note that a list of data created by selecting entries from table "Addresses-Branches" (ESGOSites table) should be designated as recipient list.

Market research

It is possible to access the market research targeted campaigns via the Calendar dashboard screen (page: General-Planned actions).

Selecting a specific campaign from here and pressing the -Fill-out button causes the questionnaire data entry screen to appear. At the same time, it is possible to access market research campaigns with anonymous third parties via the Public Questionnaire option of the main menu (menu: My tools/ New). In any case, filling in the public questionnaire of market research type is possible by using the ES.SVA - Survey activity type.



The data entry screen of the questionnaire contains the individual inquiries placed, to facilitate filling in the questionnaire, on distinct inquiry category-based pages. The method of filling in the inquiries varies depending on the inquiry type. The inquiries that require mandatory replies are highlighted in red while, in case an inquiry has the feature of photo attachment enabled, are via buttons -Camera and -Photo, it is possible to take and view inquiry photos, accordingly.

At the end of this process, and by pressing the -Completed button, the current questionnaire is saved, while at the same time selecting whether to change its status to completed.

Data collection

An ad hoc questionnaire is usually created via the Calendar dashboard screen, using the ES.RDC-Data collection activity type

Selecting the "Data collection" option of the -Actions button displays a list of the available questionnaires and then, by selecting the preferred one, the user is redirected to the data entry screen to fill out its inquiries. Regarding the data entry screen and filling in the inquiries exactly the same applies as described above in section Market research. Additionally, the following special features are also supported:

- Auto fill answers for the new questionnaire, based on the answers provided in the previous one.
- Direct access, from the Entries page on the Calendar dashboard screen, to the latest questionnaire answers for the site overview.

Settings

Default value

Company parameters

Property group code concerning the points of sales
(POS_related_property_set_code)
The questionnaire that appears on the Entries page of the Calendar dashboard screen. Indicates the code of the questionnaire properties group.

Mobile parameters

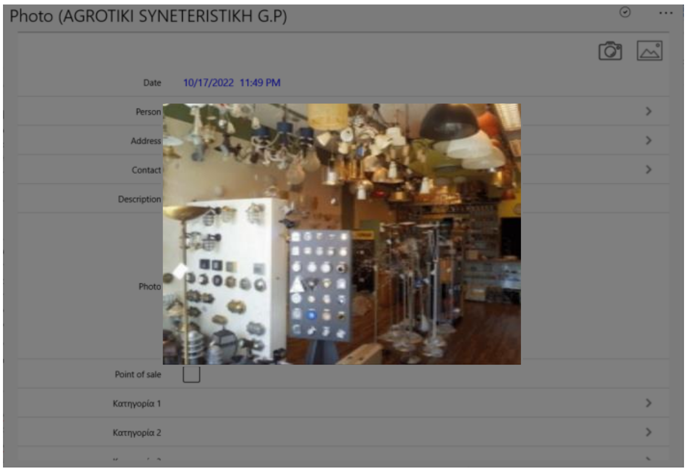
Task_RDC_CopyLastSurvey — 0-No
Activates, in a "Data collection" type of questionnaire, the auto fill responses feature for the new questionnaire, based on the most previous questionnaire responses.

Photo capture

Photo capturing is used to capture in image format information collected from the company's customers. The ability to take a photo related to a person is available from either the Calendar dashboard screen, or the customer dashboard screen. Furthermore, as mentioned above in the "Questionnaire" section, it's possible to take a photo regarding a specific inquiry. Finally, via the "Photo" option of the main menu (My Tools/ New), it is possible to take photos of a general nature. In any case, the ES.PHOTO-Photo activity type is used to take photos. Note that the photo image files are stored in the Photos device folder.

By calling the "Photo" option, regardless of where within the application that happens, the device camera is activated to take a photo. At the same time, the user is given the opportunity to enter information regarding the photo subject. It should be noted, that specifically for photos referring to the site "overview", the Point of sales attribute must be enabled. Photos characterized as such are used when previewing a site on the map.

At the end of this process, and by pressing the -Completed button, the current photo capturing activity is saved, as well as the relevant photo.



Settings

Settings	Default value
Mobile parameters	
Photo_PreferredSize The default dimensions for image-type files. Concerns the iOS platform only.	960.680
Photo_PreferredSize_Cross The % of size reduction for image-type files. Concerns UWP & Android platforms only.	70

Photos receipt

Through the Photos receipt option of the "Sync" menu, it is possible to download, from the server to the "Photos" device folder, the image files from photo shooting-type activities.

At the end of photo receiving process, a relevant notification message appears to the user, regarding the number-volume of downloaded photos. Additionally, in case the photo receiving process fails for some reason, a message including the cause of the error appears.

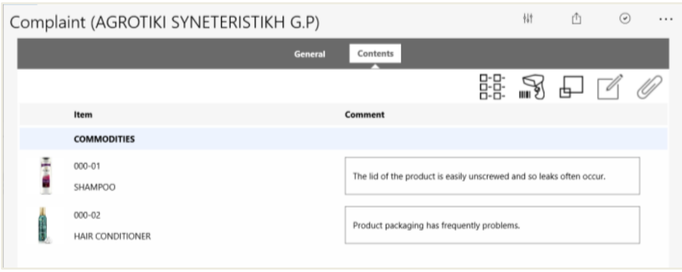
Note that

Step-by-step instructions for the required settings to download the photos can be found in the Tools & Configuration/ Systems communication/ Data synchronization/ Photos receipt section of the present manual.

Customer support

Logging issues related to customer support actions is possible via the actions Complaint for issue logging and Case for service request logging. The mobile user is responsible for properly logging issues and sending them to the back office, while back office-authorized users undertake the necessary supportive actions that follow.

Complaint



Activities of type ES.COM-Complaint are ad hoc activities that are typically logged through the Calendar dashboard screen. Used to log issues reported by the customer.

By selecting the "Complaint" option of the -Actions button the data entry screen of activity, with the Customer-address and the start date-time information already populated, while the user is required to enter a brief description of the issue (General page). In case the issue concerns specific items, these are logged using appropriately configured line input buttons (Contents page).

At the end of this process, and by pressing the -Completed button, the current task is saved while simultaneously selecting whether to change its the status completed.

Settings — Default value

Mobile parameters

Task_BarcodeSaveField
The task line field where the barcode, used during item selection, is assigned.

Advanced settings

Screen display format
Step-by-step instructions on how to set up - at an application customization level - the display format of the activity Data entry screen can be found in section Data entry screens/ Master-detail entity (DocForm) of the MOB-ImplementationGuide manual.

Data entry screen

Header

Description	A brief issue description. Cannot be empty.
Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Task means	The default comes from the corresponding field of the task type.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the "Planned start" of the task and the "Usual duration" of the task type.
Priority, Category, Severity	Filled-in by the user.
Reply	Filled in by the user, if the issue can be resolved immediately.
Status	Updates when the activity is saved. Cannot modify this field.
Actual end	Updates when the task is completed. Cannot modify this field.

Contents

Item	The inventory item, where logging occurs.
Comment	Description of the issue.

By focusing on a specific task line and by using the appropriate buttons, it is possible to manage the line.

Button	Comments
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

Insert line buttons

Inserting an activity line is possible by using any one of the available buttons of insert lines list type, or by using the Barcode button.

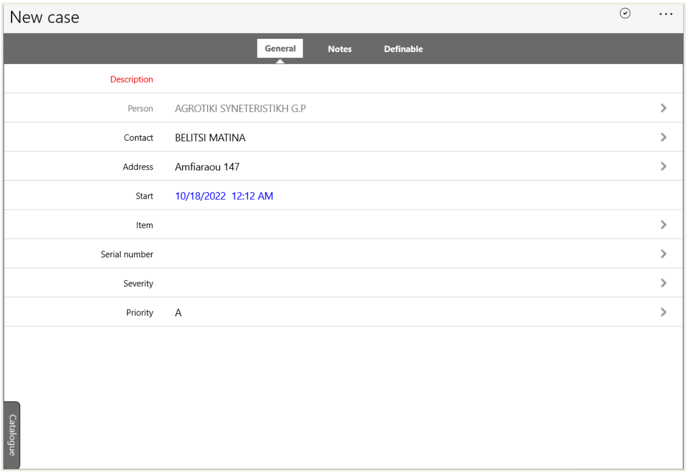
Note that by focusing, from a line insert list, on the preferred items and pressing the -Select button, lines are inserted while allowing the user to remain on the list, while by pressing the -Back button the user can insert lines and return to the task's data entry screen.

Button	Comments
	Items list. Display a list of the full inventory items catalogue. The list is sorted alphabetically by item description, while also allowing sorting by code. Searching for a specific item can be done either by code, or other identification data (description, grouping elements, etc.) In addition to the key elements of the item (image-code-description), information about availability at the current company branch (balance-expected) and the basic sales price of the item is displayed.
	Barcode. Displays the item's barcode scanning area. Detailed instructions on how to set up insert line via the barcode process can be found in section Amendments/ Mobile parameters section of the MOB-ImplementationGuide manual.

Other buttons

For the rest of the buttons on the data entry screen of the Complaint activity type, the exact same applies as described in the corresponding section of the Counting activity type.

Support case



ES.CASE-Case type activities are ad hoc activities that are typically registered through the Calendar dashboard screen. Used to log support requests reported by the customer.

By selecting the “Case” option of the -Actions button the data entry screen of activity, with the customer-address and the start date-time information already populated, while the user is required to enter a brief description of the issue (General page). Specifically in case the request refers to a specific item, that can also be inserted. At the end of the process, pressing the -End button saves the current activity.

Data entry screen

Description	A brief request description. Cannot be empty.
Person	The customer of the entry from which the activity was added. Cannot modify this field.
Address	The default is the address of the entry from which the activity was added.
Contact	The default is the contact of the entry from which the activity was added.
Task means	The default comes from the corresponding field of the task type.
Start	The default is the current date-time.
Severity, Priority	Filled-in by the user.
Item	Filled-in by the user, provided that the request is specific to a particular item.

Technical information

The page “User defined fields” fields are not supported by the product implementation of the ES.CASE-Case activity type of the EBS application. To ensure the smooth operation of the data delivery process, the preferred fields must be added to the user defined ones of the activity type.

Other activities

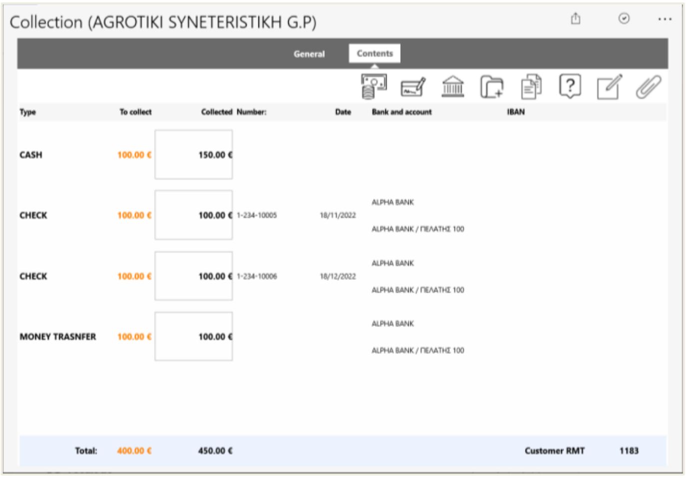
This section describes ESMobile application actions that are not included into the daily operations of the device user.

Cash collection

The ESMobile application makes it possible to fully manage documents of 51-Cash receipt type. A cash receipt can be issued either through a pre-agreed with the customer sales and distribution collection order, or through an ad hoc registration. Managing collection documents is usually possible via the Calendar dashboard screen, while also allowing the user to manage them via the dashboard screen of a customer or point of sales. Note that:

- To ensure the smooth operation of the data delivery process, the identification data for the collection document logged by the ESMobile application (series-code) must be unique. The document series plays a key role in ensuring this uniqueness, whose setup process varies, depending on whether the ESMobile application is used as a simple logging tool or as a collection issuing tool. Instructions for setting up the document series can be found in section EBS application configuration/ Document types & series of the present manual.
- Once a cash collection has been sent to the server, modifying it is not allowed through the ESMobile application interface.

By pressing the “Collection” option of the Actions-button on the Calendar dashboard screen, the data entry screen of the Collection appears, with the customer-address, as well as the start date-time information already populated (General page). Specifically in case the collection is performed within the context of a specific command, the amount to be collected is also filled-in (Contents page), but the user is also allowed, via the appropriately configured line input buttons, to add additional collection lines.



At the end of the process and by pressing the -End button, the overflow check is activated for cash collection per day and in case a limit overflow is detected, a relevant warning message pops up to inform the user and the saving process is interrupted. Otherwise, the current collection is saved by simultaneously changing the cash collection status to completed. Note that upon saving the document, and provided that the functionality of signature attachment is activated, the signature screen appears. Saving the signature will automatically attach a signature file to the attachments of the current collection.

Settings

Default value

Mobile parameters

Collection_DefaultAddLineMethod — 0-Ad hoc

The default way to insert collection lines. The available options are:

- 0-Ad hoc. When calling the collection data entry screen, a collection line with an empty amount is automatically inserted. Note that the type of line inserted is determined by the customer “Payment means” field. If this field is empty, a selection list of collection line type appears.
- 1-Outstanding invoices When calling the collection data entry screen, an outstanding invoices selection list appears.

CollectionLimitPerCustomer — 0

The cash collection limit per day & customer. To fully disable the check, assign value 0.

Doc_LimitForCashCollection — 0

The limit of the sales invoice value, to allow for its collection in cash. To fully disable the check, assign value 0.

Doc_CancelPermissionRequest Displays, when calling for a document cancellation action, a screen for the authorized user to specify a verification code.	0-No

Advanced settings

Screen display format

Step-by-step instructions on how to set up - at an application customization level - the display format of the document Data entry screen can be found in section Data entry screens/ Master-detail entity (DocForm) of the MOB-ImplementationGuide manual.

Data entry screen

Header

Person	The customer of the entry from which the collection was added. Cannot modify this field.
Address	The default is the entry address from which the collection was added.
Contact	The default is the entry contact from which the collection was added.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the “Planned start” activity of the collection and the “Usual duration” data of the ES.COL-Collection task type.
Status	Updates when the collection is saved. Cannot modify this field.
Notes	Filled-in by the user.

Contents

Line type	Mode of line amount collection with the following available values: Cash, Fund Transfer & Note. Automatically populated based on the insert line button. Cannot modify this field.
To collect	The default, based on the collection order, collection amount. Cannot modify this field.
Cash collection	The actual collection amount.
Number	Filled-in by the user. Refers to the fund transfer number, for a fund transfer-type line, or to the note number, for a note-type line.
Date	Filled-in by the user. Refers to the claim date, for a fund transfer-type line, or to the due date, for a note-type line. Note that the date of the issue of the note is automatically filled-in by the system, with the current date as the default value.
Bank account information	The details of the bank account for the amount claim are filled in by the user. Only applies to a fund transfer-type or note-type line.

By focusing on a specific cash collection line and by using the appropriate buttons, the user can manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad pops up.
	Displays a screen with the full details of the selected line.
	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.

General totals

DSO	The customer days sales outstanding. The index is formed based on the customer log information.
Values	The total sum of the cash collection line’s corresponding fields.

Insert line buttons

Inserting a collection line is possible by using any one of the available buttons on the collection document data entry screen.

Button	Comments

	Cash. Inserts a Cash-type line.
	Fund transfer. Insert a Fund transfer-type line.
	Note. Inserts a Note-type line.
	Select. Displays a list with the available line types.
	Days sales outstanding. Calculates the DSO index, based on the current collection details. The DSO calculation involves both the selected invoices from the list of outstanding invoices and the current collection lines.
	Unsettled. Displays a list of the customer-point of sales unsettled invoices, while allowing the invoices of all customer points of sales to be displayed. The list is sorted by invoice issue date. In addition to the basic invoice details (code-issue date), the invoice expiry date and the total & open invoice amount are also displayed. In this case the user selects payment in cash, the check is activated for cash collection overflow and if there is an exceeded limit detected, a warning message appears, and the line type is automatically converted to a daily fund transfer.

Dashboard screen

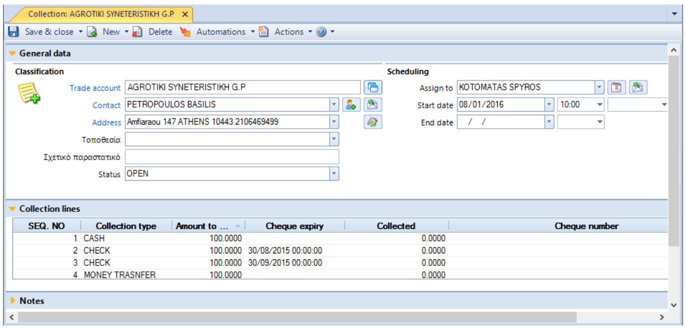
The collection documents list can be accessed via the relevant option of the main menu (menu: Actions). By focusing on a specific document, the user is redirected to the dashboard screen, where an overview of the document can be viewed (code, date of issue, status, etc.). The -View button redirects the user to its data entry screen, while the -Attachments button redirects to its attachments management screen. Finally, the -Actions button allows the user to directly perform a series of actions on the current document.

Action	Comments
Printing	Triggers the physical printing process of the document. Note that the physical printing of a document requires specific a document type or series. The required settings can be found in section EBS application configuration/ Document types & series of the present manual.
Send via E-mail	Auto composes an E-mail with the customer as recipient and a pdf-type file as an as attachment, displaying the current document data and the customer signature. It is also possible - using the appropriate configuration - to record text. Detailed instructions on how to set up the Send E-mail process are provided in section Data entry screens/ Master-detail entity/ Advanced functionality/ E-mail screen of the MOB-ImplementGuide manual.

Collection order

Creating a collection order is possible by the back office and via activity type ES.COL-Collection (menu: Sales/ Activities/ New action). The collection order details determine the customer-address, the assigned resource, the pre-agreed due date, as well as the payment method and the amount to be collected (section: Collection lines).

It is possible to access the collection orders to be executed via the Calendar dashboard screen (page: General-Open tasks).

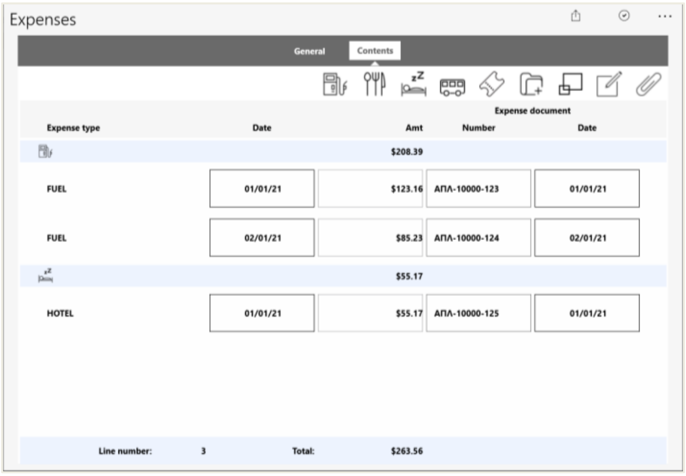


Expenses list

The expenses list is a “standard” form used by the mobile user to fill in - submit the expenses made during a trip. The expenses list can be managed using an ES.EXP- Expenses type task. Note that:

- When sending a complete expenses list to the server, the corresponding “accounting” expense document is automatically created. In order to ensure the smooth operation of the data delivery process, the appropriate document type-series should be specified in the “Expense report - Document type” field of the user services profile.
- The expenses list that’s in progress remains available for additions or modifications by the device user. However, once it's sent to the back office, modifying it is not allowed, using the ESMobile application interface.

The list of already registered expenses list can be accessed via the Expenses list option of menu “Internal notes” (menu: My Tools), while a new expenses list can be logged via the Expenses list option of menu “New” (menu: My Tools).



By calling a new expenses list, the data entry screen is displayed, where the user is required to first fill in a brief description and the period of validity for the expenses list. (General page). Then, using appropriately configured insert line buttons, the user shall proceed with the detailed logging of the individual expenses (Contents page).

At the end of this process, and by pressing the -Completed button, the current expenses list is saved, while at the same time selecting whether to change its status to completed.

Data entry screen

Header	
Description	A brief description of the expenses list. Cannot be empty.
Start	The default is the current date-time.
End	The default value shall be calculated by taking into account the “Planned start” of the task and the “Usual duration” of the task type.
Status	Updates when the activity is saved. Cannot modify this field.
Actual end	Updates when the task is completed. Cannot modify this field.
Contents	
Expense type	The expense type of the line amount, with the following available values: Fuel expenses, Food expenses, Accommodation expenses, Transportation expenses & Toll expenses. Automatically populated based on the insert line button. Cannot modify this field.
Date	The date the expense was added.
Amount	The expense amount.
Document Number & Date	The details of the document that accounts for the specific expense, filled-in by the user.
Comments	Filled-in by the user.

By focusing on a specific cash collection line and by using the appropriate buttons, the user can manage the line.

Button	Comments
	By focusing on a numerical field of the line, the numeric keypad pops up.
	Displays a screen with the full details of the selected line.

	Delete line. Note that on UWP & Android platforms, the delete button appears by scroll to the right of the current line.
Group totals	
Values	The sum, by grouping field, of the corresponding fields for the expense list line. Using the -Collapse button, it is possible to expand-collapse the groups. Specifically in UWP & Android platforms, it is also possible to focus on the area of a group, in order to expand-collapse a specific group.
General totals	
Values	The total sum of the corresponding fields for the expense list line.

Insert line buttons

Inserting an expense list line is possible via any one of the available buttons on the expense list document data entry screen.

Button	Comments
	Fuel expenses. Inserts a Fuel expenses-type line.
	Food expenses. Inserts a Food expenses-type line.
	Accommodation expenses. Inserts an Accommodation expenses-type line.
	Transportation expenses. Inserts a Transportation expenses-type line.
	Toll expenses. Inserts a Toll expenses-type line.
	Select. Displays a list with the available expense types.

Other buttons

For the rest of the buttons on the data entry screen of the expense list, the exact same applies as described in the corresponding section of the Counting activity type.

Expenses approval

Calling the Expenses preparation (menu: Accounting/ Expenses) option from the back office displays the list of expenses, logged by individual devices, to be approved. In the approval stage, which is always conducted by back-office authorized users, it is possible to add further details to individual expenses, for a well-formed accounting overview. Note that via the relevant automation “Transfer attachments from expense report tasks to the expense report documents”, it is possible to transfer attachments from the primary expense lists to the relevant expense document.

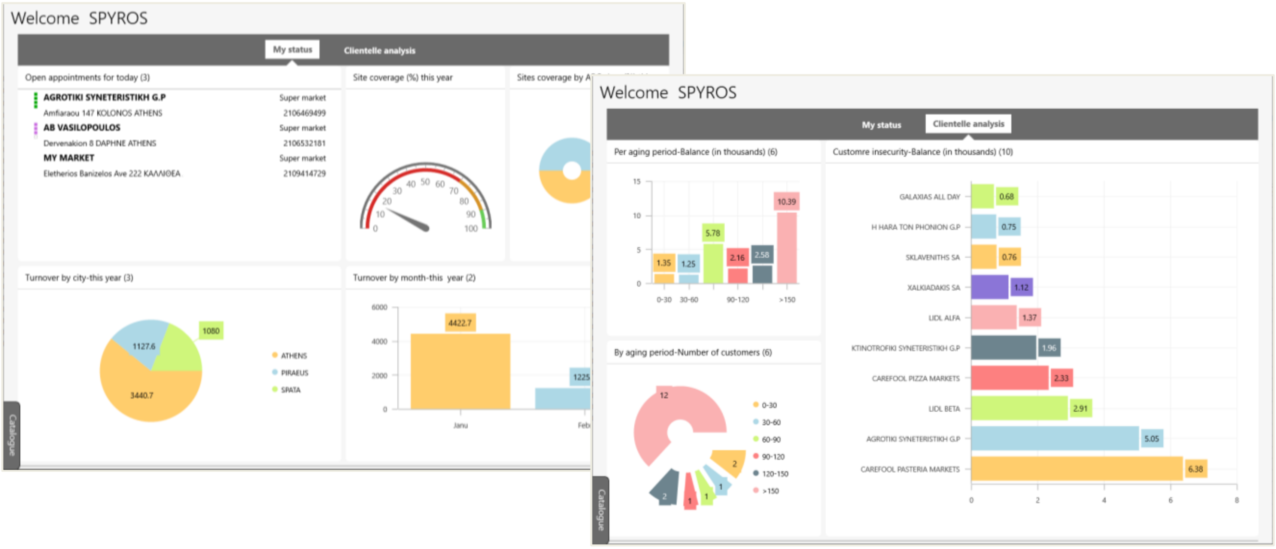
Reporting

This section describes the reports available in the ESMobile application. These reports are mostly based on local data and are designed to provide managerial & statistical information, regarding the mobile user's activities. Note that the "validity" of local reports also depends on the frequency of data receipt from the server.

Local reports

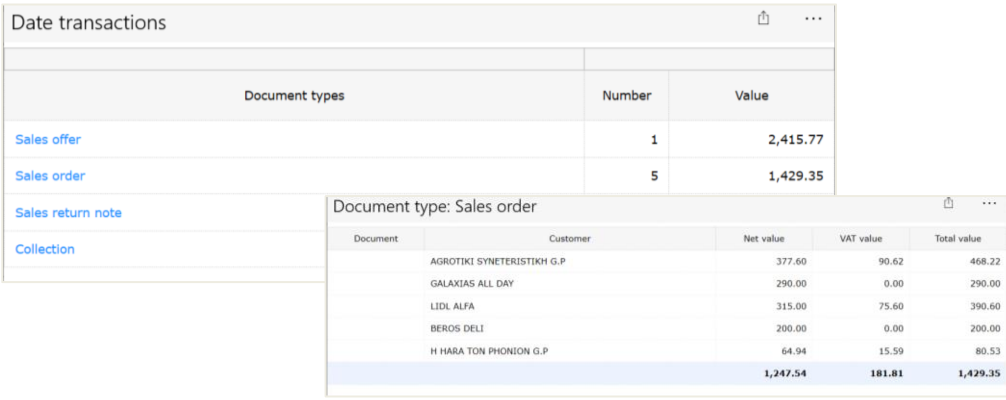
My insight

Provides information on the device user activity. The first page displays the daily open appointments, turnover allocation and the customer list coverage % of the device salesperson-user, based on their completed appointments, while the customer list analysis page displays indicators, such as the customer balance-count per aging period and the top 10 customers, based on their open balance. This report can be accessed from the corresponding main menu option (menu: Home).



Daily summary

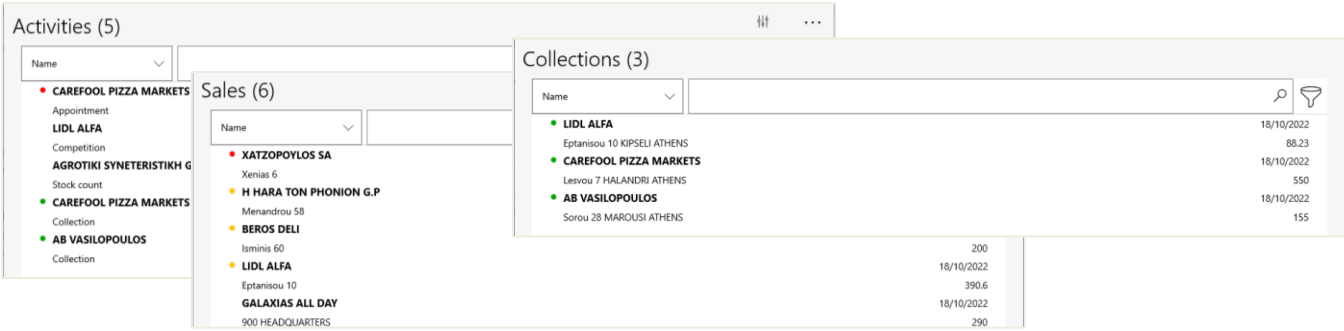
Provides information regarding the total transactions performed by the mobile user, within the current date. More specifically, the report provides information regarding daily quotation notes, sales orders, returns and cash collections, grouped by document type. When focusing on a specific document type, the detailed list of documents is displayed. This report can be accessed from the corresponding main menu option (menu: Info).



Activities overview

The ESMobile application has several overview lists regarding the activities performed by the mobile user. The customer-related activities (sales, cash collections, merchandizing activities etc.) can be accessed through the relevant options of the “Actions” menu, while the activities related to internal company communication (data change requests, expense lists etc.) can be accessed through the relevant options of the “Internal notes” menu.

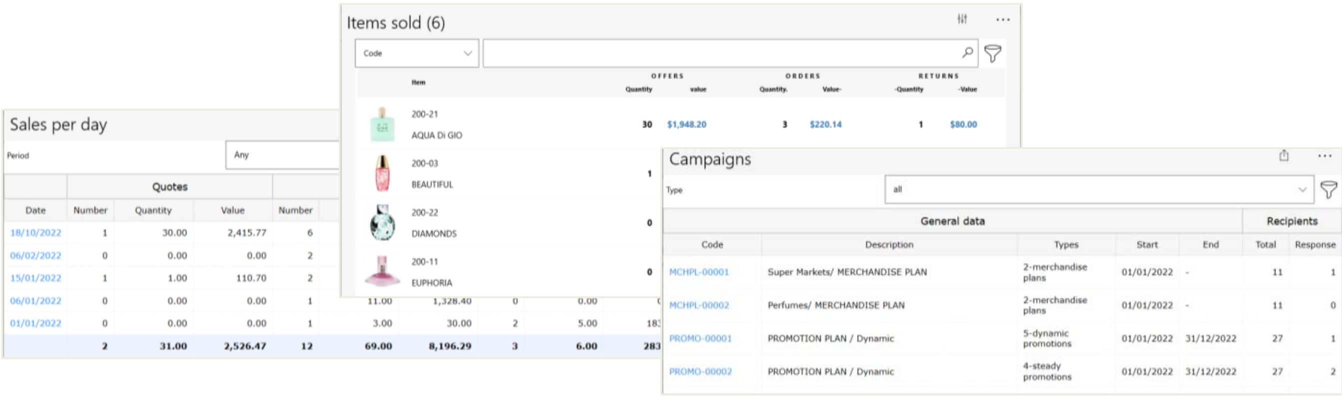
For activities that have status tracking (e.g. merchandizing tasks), the icons used for marking their current status are Canceled and Completed. On the contrary, activities without status tracking (e.g. sales documents), are marked relatively to the synchronization process (Local, Pending and Temporary).



Statistics

Statistics reports related to the device user activity can be accessed via the sub-options of the “Statistics” menu (menu: Info).

Campaign responses	Information on the progress of the campaigns to be carried out during the current period. When focusing on a specific campaign, a response analysis runs per customer-point of sales.
Customers balance	Information per customer regarding the current book & commercial balance, the open notes amount and the customer turnover.
Sales per day	Daily information regarding the number-quantity-value of documents. When focusing on a specific date, the detailed list of documents is displayed.
Cash collections per day	Daily information regarding the amount of collection orders & cash receipts broken down by payment method (cash, notes, fund transfers). When focusing on a specific date, the detailed list of cash receipts is displayed, while focusing on the line of totals in the “Note” column, the detailed list of sub-notes is displayed.
Items sold	Information on the quantity-value of the documents per document type and item.
Yearly comparison	Displays the sales quantity-value per period, for the current and previous year, as well as their deviation %. When focusing on a specific period, an analysis runs per customer & item.



Online reports

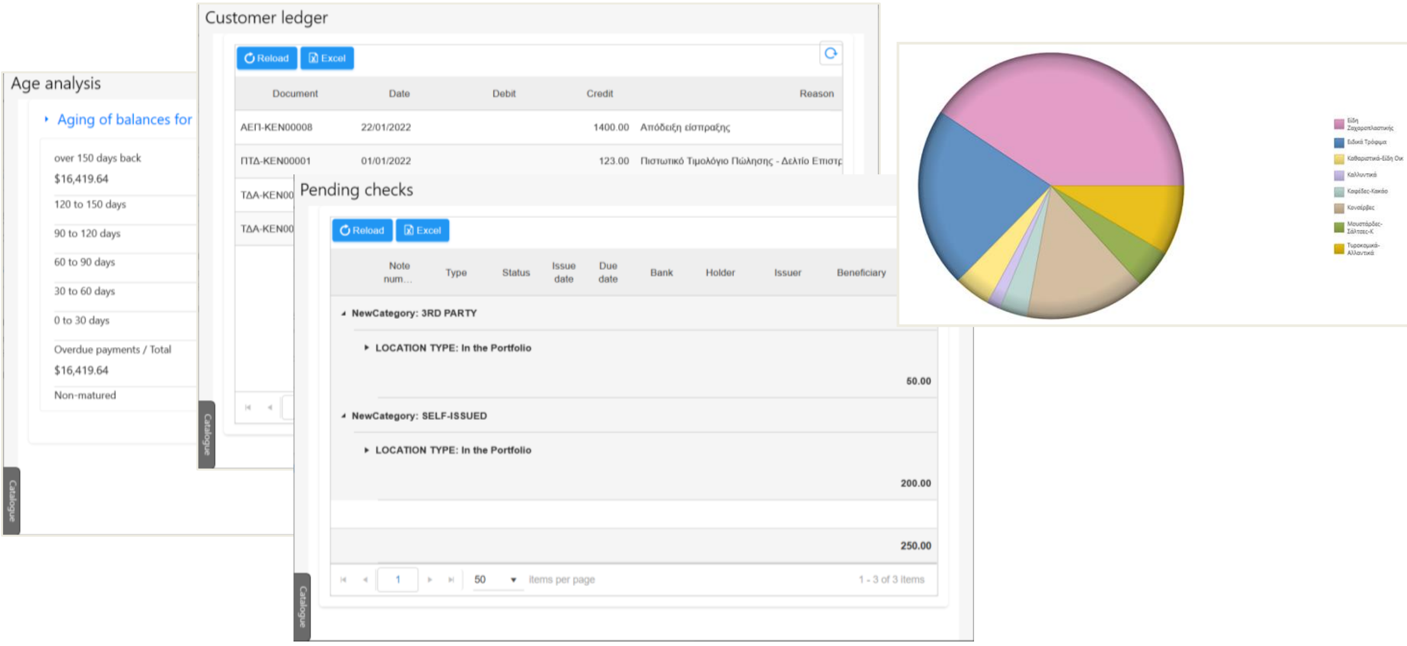
Financial reporting

The ESMobile application includes a number of financial reports, that provide information at both a customer-point of sales level (Ledger, Customer overview, Open notes, etc.) and at an inventory item level (Movement log, Availability per W/H, Current balance overview, etc.). These reports can be accessed by the customer & item dashboard screen, correspondingly.

Statistics

The statistics reports related to the device user activity can be accessed via the sub-options of the “Statistics” menu (menu: Info).

Target progress	Displays the budgeted-actual turnover & number of appointments of the salesperson-user of the device for the current month, as well as their deviation %.
Total target progress	Shows the comparison between the current & previous fiscal year, for the budgeted-actual turnover of the salesperson-user of the device, as well as their deviation %.
Turnover analysis.	Displays the budgeted-actual turnover per month at the same time as an actual turnover breakdown, at an item group level.



Tools & Configuration

Systems communication

This section describes to the elements that determine the data to be exchanged and the individual options of the data synchronization process.

Data synchronization scenarios

The ESMobile application comes with data-type files (espack files), in which the data exchange product scenarios between the EBS & ESMobile application have been implemented.

Importing data

The data importing scenarios determine the information sent from the device to the server. The value of the RecordState field (value: 0-Local) constitutes a criterion to filter filtering local database entries that will be included in the relevant package to be imported.

Exporting data

The data exporting scenarios determine the information sent from the device to the server. The criteria for filtering central database entries to be included in the relevant package to be exported vary significantly, depending on the entity to which each scenario refers.

Customer base

- Active customer. The device's customer base assignment is based mainly on the salesperson-customer link. Out of the full customer database of the company, available on the devices are the customers that have been assigned to the salesperson-user of the device, as well as those that have scheduled activities assigned to the mobile user. Alternatively, it is also possible to assign customers via territory.
- Prospect customer . Available on the device as prospect customers are the persons of leads that have been assigned to the user-resource of the device and have a status of in progress.

Item catalogue

- Inventory item Allocation of the device's items catalogue is mainly based on the field available on mobiles. Out of the full company's items catalogue, available on the individual devices are the items whose Groups, as well as the Items themselves are marked as available on mobiles. Alternatively, in case the territory-based assignment method has been selected for the customer base, it is possible to limit the items catalogue to those that correspond to the work location of the device resource-user.
- Catalogue item. Available on the device are all types of catalogue items that refer to items that are included in the items catalogue of the user, as well as those that have been identified as a competition product and meet the required rules of item-competition linking. Full description of these rules can be found in section EBS application configuration/ Main entities/ Catalogue items of the present manual.

Task

- General task. Assigning tasks to the device is mainly based on the assigned to field. Out of all the tasks, available on the device are all tasks referring to the mobile user either as the “assigned to” resource, or as a simple participant. At the same time, for informative reasons, available on the device are all closed tasks of persons included in the device user’s customer base, regardless of the “assigned to” resource. Alternatively, in case the territory-based assignment method has been selected for the customer base, available on the device are only the tasks of persons within the territory.
- Visit plan. Available on the device are all visit plans assigned to the resource-user of the device and plans with a status of in progress. Regarding the plan entries, available on the device are those that refer to a customer that is included in the customer base of the device user.
- Message with response . Available on the device are all messages with a status of completed and a validity date within the current date.

- Merchandizing plan. Available on the device are all merchandising plans that refer to customers that are included in the customer base of the device user, have a status of in progress and a validity date within the current date.
- Questionnaire/ Property group . In order to meet questionnaire management needs, available on the device are all active property groups of type 1-Campaign survey or 2-Data collection and their properties. Note that out of the individual properties of a property group, the ones of type 6-Value in Base Currency, 7-Code List and 13-View are not available on the device.
- Questionnaire/ Campaign. In order to meet questionnaire management needs, available to the device are all active campaigns, with their dates of effect filled-in.
- Sales opportunity. Available on the device are all sales opportunities that have been assigned to the resource-user of the device.
- Collection order. Available on the device are the collection orders that have been assigned to the resource-user of the device.
- Expense list. Available on the device are the expense lists, regardless of status, that have been assigned to the resource-user of the device.

Document

- Sales document . Available on the device are the documents referring to customers that are included in the customer base of the device user, that have standard as cancellation indicator and their issue date is within the past time period designated by the company parameter "Days limit for forwarding documents to mobiles" (DaysForDocToSendToPDA). Note that, out of all document types on the EBS application, available on the device are only those supported by the ESMobile SFA application functionality.
- Template order. Available on the device are template orders with status active, with the values Point of sales & Template order respectively in the category 1 & 2 fields, and with validity dates within the current date.
- Offer agreement. Available on the device are all offer agreements with a status of in progress and a validity date later than the current date.
- Local pricelist. Available on the device are pricelists referring to customers that are included in the customer base of the device user. Out of these pricelist lines, only those referring to an item available on the device and with a validity date within the current date are selected.

Data synchronization

From the devices it is possible to directly connection and communicate with the server, both in order to download updates or exchange data. The individual processes for communication with the server can be accessed via separate options in the ESMobile application main menu (menu: Sync). It should be noted here, that the “Sync” menu options have been marked as systemic. This ensures that, regardless of the interventions that may have been made to the main menu - at an application customization level - these options are still available to the device user.

Sending data

The data delivery process updates the server with all the latest entries and interventions performed by the device (new persons, address info, implementation of activities to be executed, new documents, etc.)

Upon completion of the data delivery process, a corresponding user notification message pops up. Otherwise, in case the data delivery process is not feasible, a message that explains the error appears. Note that, it is possible to remove the right to send data from the device user, when their device is outside of a "wired" communication. This feature is enabled by the back office and by appropriately setting up the device Communication Permissions field.

Downloading data

The data download process updates the device with updated data from the **back office** (persons & contacts, items catalogue, new tasks to be performed, etc.)

At the end of data download process, a notification message pops up, regarding the total duration of the process execution and the amount of data received. In case the data download process is not feasible, a message explaining the error appears. Note that, it is possible to remove the right to download data from the device user, when their device is outside of a "wired" communication. This feature is enabled by the back office and by appropriately setting up the device Communication Permissions field.

Data synchronization

The data synchronization process first activates the process of data delivery as well as of importing this data to the server and immediately after that, the process of the device downloading the updated data from the back office. When it comes to reporting regarding the duration of the execution process and the data exchange, the same applies as described above for the individual execution of sub-processes.

Data initialization

When the ESMobile application is first installed on a device and when the user logs in to the application, the data initialization process is also automatically activated. Thereafter, data initialization is required only in cases when, for any reason, we wish to recreate the database (e.g. change of the mobile resource-user) or in case of a major upgrade to the ESMobile application version.

In any case, the data initialization process first activates the data delivery and then proceeds to the deletion and recreation of the device’s database. Recreating the database ensures that it includes the last updated back-office data. At the end of the data initialization process, a notification message appears, regarding the total duration of process execution. Otherwise, in case, for any reason, the initialization process is not feasible, a message explaining the error appears.

Photos receipt

The photo receipt process downloads from the back office, into device folders, photo files regarding the items catalogue (option: Items), or photo-type activities (options: Points of sales & Other photos). The image file storage folders are _ProductImages_ for items and Photos for photo captures.

At the end of photo receipt process, a notification message appears, regarding the number-volume of image files saved in the device. Additionally, in case the photo receiving process fails for some reason, a message including the cause of the error appears.

In case there is a need for parallel use of different major versions of the ESMobile application, it is possible to set a common, regardless of site, area for saving image files regarding the items catalogue or photo captures. The required settings are:

Item catalogue

- Create the preferred storage area as a virtual directory of the IIS server (e.g. ESMobileProductImages).
- Specify the area URL to the relevant field of the IIS configuration screen.

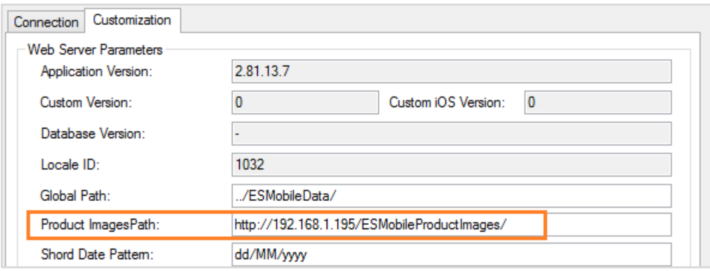


Photo captures

- Create the preferred storage area as a virtual directory of the IIS server (e.g. ESMobilePhotos)
- Specify the **area URL** in the company parameter “Photos from mobiles-Save in folder” (e.g. http://192.168.1.195/ESMobilePhotos/)

Settings

Settings	Default value
Mobile parameters	
ImageFileExtension The type of image files. In order to link item-item image, image files of this type should exist in the ProductImages folder of this device.	jpg

Attachments

The attachments process downloads from the server to the memos folder of the device the relevant attachments for all entities of the ESMobile application. A full description of this process is provided in section Appointment management/ Attachments/ Download attachments of the present manual.

Item balances

The process of downloading item balance information ensures that the device is updated with the updated data for stock by dimension for the items monitored in the color & size dimensions. At the end of this process a relevant user notification message pops up. Otherwise, in case, for any reason, the execution of the process is not feasible, a message explaining the error appears.

ESMobile device

This section presents the operational configuration parameters of the ESMobile device, as well as a series of auxiliary & informative tools available to the mobile user.

Settings

User preferences

The Services profile area of the Settings screen allows the user to set up a number of options related to the interface configuration of the ESMobile application.

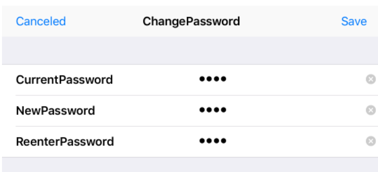
- Main menu. The ability to remove the options that are not part of the device user's daily operations from the ESMobile main menu. This feature activation will be visible after restarting the ESMobile application. Concerns the iOS platform only.
- Gray scale style . The ability to change the default style of the ESMobile application. This setting has an effect on the menu, lists, management screens and generally on the entire user interface of the application. This feature activation will be visible after restarting the ESMobile application.
- Map. The ability to configure elements that affect the function of the “Calendar” screen (Maximum number of pins) and the “Nearby customers” screen (Search radius).
- ISO 8601 Calendar. The ability to enable the ISO 8601 standard, as a calculation method of the number of the week displayed on the “Calendar” screen. Concerns the iOS platform only.

User identification

The device user can opt for an identification method in order to access the ESMobile application.

Identification by code

In this case, the password in the ESMobile application is the same as for the EBS application. But it is also possible to change password through the ESMobile application interface. This is possible by selecting the corresponding option on the “Settings” screen (menu: Settings/ Services profile). Note that, to be able to save the new password, there must be a connection to the back office.



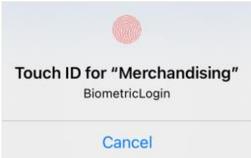
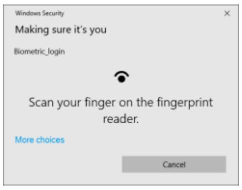
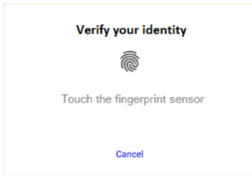
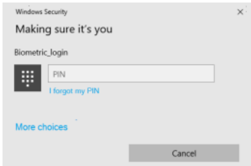
Biometric identification

Selecting the biometric Identification option of the “Settings” screen (menu: Settings/ Services profile), allows the device user to be identified either by using a fingerprint, or by using a personal Identification code (PIN). Note that, in order to allow for biometric identification, fingerprint scanning should be supported by the device, or alternatively, a personal Identification code (PIN) should have been set.

Having enabled this option, upon logging in to the ESMobile application, the system attempts to identify the user via fingerprint or - if there is no fingerprint - via PIN. In any case, at least one successful entry to the ESMobile application is required, using a fingerprint or PIN, to "verify" the user's biometric identification.

Cancellation of the biometric identification process is caused either automatically, following repeated erroneous identification attempts, or by pressing the "Cancel" button on the biometric identification screen. In this case, the user identification process via the “standard” password to the ESMobile application is activated.

iOS	UWP	Android

Finger print			
PIN			

Technical information

In order to allow for biometric identification, fingerprint scanning should be supported by the device, or alternatively, a personal Identification code (PIN) should have been set.

Device identification

The General area of the Settings screen provides information about the automatically generated identification codes of a device. By focusing on these options, the user can send the code via e-mail.

- Device ID . It is the unique identification code of a device and is used by all data exchange processes between the EBS & ESMobile applications. This code is generated automatically by the system after the ESMobile application is first installed on the device.
- Notification ID . It is an alternate device identification code, used solely by the process of notification message delivery from the back office to the device. This code is generated automatically by the system after the ESMobile application is first installed on the device.

Note that

The device ID is the component of connecting a device with a number of device-specific settings. To avoid the need to reset the device entry when it gets a new ID, it is possible to "link" an existing device entry with a new device ID. This is possible from the back office, by calling the option "Update device with new identifier" of the "Automation" menu on the device management form.

Localization settings

- Language. When the ESMobile application is first installed on a device, the language designated as device language is automatically selected as the application language, unless the device language does not belong to one of the ESMobile application-supported languages. In that case, English is automatically selected. Then, via the "Application language" option of the "Settings" screen, the device user can select their language of preference.
- Formatting. Localization data (dates, numbers & currency) formatting depends on the value of the mobile parameter "Culture". Specifically for Currency-type fields, the following configuration options are also provided:
  - Currency symbol (parameter: CurrencySymbol). Specifies a specific symbol or currency code (e.g. € or EUR). The "space" character is used for no symbol.
  - Positive & negative value display format (parameter: CurrencyPositivePattern & CurrencyNegativePattern, respectively). The available values are:

Positive 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 Printer option of the “Settings” screen allows the device user to enable the physical printing feature via the ESMobile application interface. Note that, a prerequisite for enabling a printer through the ESMobile application is that the printer device has firstly been recognized by the mobile device and that the two devices are paired. There are specific printers that are compatible with the ESMobile application, per platform.

- iOS platform. The compatible printers are Bixolon SPP-R400 or SPP-R410 and Zebra ZQ520, as well as printers of type AirPrint.
- Android platform. The compatible printers are Bixolon SPP-R410, Zebra ZQ520 or ZQ521.
- UWP platform. Printing capability is not available.

Note that

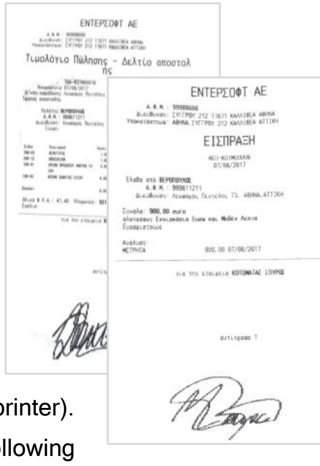
- Specifically for an AirPrint-type printer, the settings required are:
  - ✓ Go to the device settings and connect the device & the printer via WiFi connection.
  - ✓ Go to the ESMobile application settings and select the AIR-PRINTER GENERIC printer.

  Detailed setup instructions for printers of AirPrint type are provided in Article KB-01566 of the Entersoft knowledge base.
- Detailed setup instructions for printers of Bixolon SPP-R410 type are provided in Article KB-01564 of the Entersoft knowledge base.

Document printing

The ESMobile application comes with document print form samples, that are compatible with all printers supported by the application. These samples are located in ESConfig/PrintForms and concern:

- quantitative sales document (form: Document_qty_4inch)
- quantitative/value-related sales document (form: Document_4inch)
- Inventory stock transfer document (form: Transfer_4inch)
- collection note (form: Collection_4inch)



In order to differentiate a form at an application customization level, the corresponding file must be placed in CSConfig/PrintForms. More specifically, in case simultaneous use of different type printers is required, it is possible to have a print form specialization at a printer model-type. In this case, it is necessary to place each form file in an area where its nomenclature is consistent with the name of the specific printer (e.g. area: CSConfig/PrintForms/Zebra/ZQ520 for the Zebra ZQ520 printer). It's important to note that the printing process handles the selection of the printer-specific form by following the following hierarchy as a selection order: (1) PrintForms/Type/Model, (2) PrintForms/Type & (3) PrintForms, starting from the application customization area (CSConfig) and continuing to the product area (ESConfig).

Note that

- By configuring the print form appropriately, it is possible to
  - ✓ Print the digital customer signature
  - ✓ Print an EAN13 or CODE39-type barcode
  - ✓ Print the invoice or collection amount in words in Greek, Romanian and Polish
  - ✓ Print an image from a .jpg file

  - ✓ Specialize the language and the currency symbol at a specific form or form group level
- Detailed print form implementation instructions are available in the relevant articles of the Entersoft knowledge base (articles: KB-01371, KB-01419, KB-01422, KB-01425& KB-01564).
- Specifically for Zebra ZQ520 or ZQ521 printers, and in order to print non-Latin characters, it is essential to provide the printer with the appropriate font. Detailed instructions on the process of importing fonts are available in Entersoft knowledge base Article KB-01425.

Settings

Settings	Default value
Mobile parameters	
Doc_RePrintPermissionRequest Displays, when calling for a document re-print action, a screen for the authorized user to specify a verification code.	0-No
Doc_SetPrintedAtFirstPrintout Updates the document as “Printed” after printing the first copy.	0-No
Print_2nd_copy_delay_in_sec The print delay time between 2 copies (seconds).	2
Print_last_copy_delay_in_sec The delay time after the last copy is printed (seconds).	
PrintDialog_ShowCancel Enables the feature to stop printing a document.	0-No

Settings bulk update

In order to facilitate the process of setting up the installation devices, it is now possible to update the settings of an application through a file. To make use of this feature, it is necessary to:

- Designate the data to be setup in the settings.json file. Out of all the available data, define only those for which specific configuration is preferred.
- Place the settings.json file in the device. The file should be placed in the ESConfig or CSConfig folder of the ESMobile application.
- Login the user to the ESMobile application. Upon login to the ESMobile app, first the app settings are updated, based on the data designated in the file. The file is then deleted from the device.

Example

For example, we wish to configure (a) the data of connection to the server and (b) the default printer data, using the settings.json file.

```
{
  "ServerUrl": "http://192.168.50.199:8080/ESMobileServices_4.4/smartservices.asmx",
  "SelectedPrinter": "BIXOLON SPP-R410",
}
```

Technical information

The following “Settings” screen data is available in the settings.json file:

Element	Value
AppLanguage	Available values: el-GR / en-US / ro-RO / bg-BG / sq-AL / es-ES / pl-PL / sr-SP Corresponds to the “Application language” field.
ServerUrl	Indicates the full URL, as composed by the Name, Port & ESMobileServices subcomponents of the “Server Settings” page. e.g. http://192.168.50.199:8080/ESMobileServices_4.4/smartservices.asmx
AutoSetUrl	Available values: true / false Corresponds to the “Automatic setting” field of the “Server settings” page.
SelectedPrinter	Indicates the name of one of the available printers. Corresponds to the “Printer” field.
DeviceOrientation	Available values: Landscape / Portrait Corresponds to the “Device orientation” field. Concerns the Android platform only.
UseBiometetricAuthentication	Available values: true / false Corresponds to the “Biometric authentication” field.
UseGrayscaleTheme	Available values: true / false Corresponds to the “Gray scale style” field.
IsCalendarIso8601	Available values: true / false Corresponds to the “ISO 8601 Calendar” field. Concerns the iOS platform only.
NearestCustomerRadius	The user assigns a number. Corresponds to the “Search radius (km)” field of the “Map” page.
NearestCustmerMaxPins	The user assigns a number. Corresponds to the “Maximum number of pins” field of the “Map” page.
ShowWeatherOnMap	Available values: true / false Corresponds to the “Show weather forecast” field on the “Map” page. Concerns the iOS platform only.
EnableAutoVersionCheck	Available values: true / false Corresponds to the "Automatic version check" field of the "Auxiliary tasks" page.
ShowDataToSend	Available values: true / false Corresponds to the "Automatic version check" field of the "Auxiliary tasks" page. Concerns the iOS platform only.
EnableDebugMode	Available values: true / false Corresponds to the “Debug mode” field of the “Auxiliary tasks” page.
DebugUseCache	Available values: true / false Corresponds to the "Use XML cache (AdvancedList)" field of the "Auxiliary tasks" page. Concerns the iOS platform only.

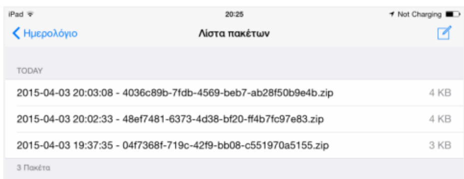
User tools

Connectivity check

In order to be able to run both the installation process of the ESMobile application version and the data synchronization processes, the device connectivity to the back office must have been ensured. The Internet and IIS & Application server connectivity checks are provided via the relevant options of button “Connectivity”.

Check data packages

The option Send pending packages of the “Sync” menu checks the device for data packages which, for any reason, have not been fully sent to the server. If such packages are detected, the process to send them to the server is automatically activates. Furthermore, through the Sent packages option of the “Sync” menu, the list of packages sent from the device to the back office appears. Focusing on the preferred entry from the list and selecting the relevant button, it is possible to send the specific package via E-mail.



Version check

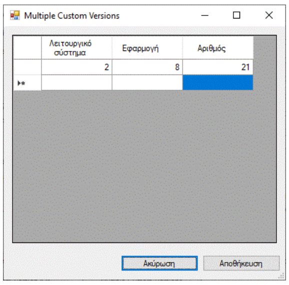
The “Version check” option of the “Sync” menu, via direct connection to the server, executes the version comparison of the ESMobile application installed on the device with the one installed on the back office (IIS Server). When the check is completed, and in case the two versions are different, a relevant notification message appears, that gives the user the ability to download and install the new version.

Full information about the identity and version of the application is provided by the Version information option of the “Settings” screen. Note that, it is possible to remove the right to download a version from the device user, when their device is outside of a "wired" communication. This feature is enabled by the back office and by appropriately setting up the device Communication Permissions field.

Technical information

The version custom build process varies, depending on whether there is common customization for all platforms or not. The appropriate case-by-case process is:

- Common custom version. The version custom number is generated by pressing the "Create custom version iOS" button of the Web Configurator tool.
- Custom version by platform. The version custom number is generated by pressing the "Multiple Custom Versions" button of the Web Configurator tool. On the screen that appears, specify the following elements:
  - Operating system. Specify the platform code. The available values are: 2-iOS, 3-Android and 4-UWP.
  - Apply. Specify the application code. The available values are: 8-SFA/Merchandising, 32-xVan, 2-Service and 1024-MedRep.
  - Number. Specify the preferred version number,



Auxiliary tasks

The Auxiliary tasks area of the Settings screen allows the user to set up a number of options related to supportive functionalities.

- Internet connection check. Disabling this option enables communication with the back office and data exchange, even if there is no connection to the web.
- Automatic version check. By enabling this option, upon user login the user to the ESMobile application, the version check process is performed automatically and, in case of incompatibility, a relevant notification message pops up.
- Show data to be sent. Enabling this option adds a notification screen during the step data delivery process, regarding the nature and amount of data to be sent. From this screen, pressing the "Cancel" button stops the delivery process and pressing the "OK" button displays a start confirmation message. Concerns the iOS platform only.

Maintenance tasks

- Local database From the corresponding “Settings” screen options (menu: Settings/ System Administration - DB/ Database copy), the device user can create a local database or send a database copy to the IIS server, as well as the ability to restore a database copy. Since the results of the restore copy process are irreversible, performing this action also requires a specific password to be specified, for which you need to contact the Entersoft Customer Support Department. Note that if a fatal failure in the device database is diagnosed when you enter the ESMobile application, a relevant user notification message pops up and the last backup copy is automatically restored.
- Other data files. The corresponding “Settings” screen options (menu: Settings/ Maintenance tasks/ Usage) provide information on the amount-volume of files in your local photo files & attachments. By focusing on these options, the user can delete the corresponding files.

Information

- Version information. From the corresponding “Settings” screen option, information is available regarding the version number of all the individual elements that make up the ESMobile application. It is also possible to display information around key application configuration tables (application parameters, document types & task types). Finally, there is direct access to the application user manual.

- Configuration files. From the corresponding "Settings" screen option (menu: Settings/ Maintenance tasks), files from the ESMobile application installed on your device are displayed as folders. Specifically for command files (folder: ESConfig/ Commands), when focusing on a specific file, further information about the command's properties is available. Concerns the iOS platform only.

EBS Application configuration

This section highlights a series of configuration elements performed in the back office that contribute significantly to the proper function of the ESMobile application.

Mobile user

User entity

- Physical person. The mobile user must be opened as a salesperson, resource and system user. These three entities must be linked to each other by specifying the same physical person.
- Resource role. In the resource entry that is related to the mobile user, the "SALES" role must be assigned.
- Services profile. At section "Companies - Branches" of the user administration screen, the entry relating to the user's main branch must be linked to the appropriate services profile.

Territories

The prerequisites for enabling the customer assignment process "via territory" are the activation of company parameter "Data export towards devices based on territory" (MobileDataBasedOn) and displaying the preferred territory hierarchal structures on the system. Special attention must be given to the following configuration points:

- Trade account rule. The selected rule type should be "ES.TerritoryBARule" and the selected filter type for all individual rule filters should be "Persons-Addresses".
- Item rule. The selected rule type should be "ES.TerritoryItemRule" and the selected filter type of all individual rule filters should be "Items". Note that specifying an item rule is optional.

Note that

When it comes to updating the device customer list after modifications in territory data, the following applies:

- In case of modifications in territory data (e.g. new customer that follows the territory rules), it is sufficient to perform the data synchronization process.
- In case of modifications in entry selection rules, either through direct intervention to a rule or by defining a new period, it is required to perform the data initialization process.

In order for the updated territory data to be available on the device, the execution of the territory hierarchy rule application process should have been scheduled, at regular intervals.

Devices

- User. The "User" field must be filled in with the device user's code. As long as the connection of user-salesperson-resource via the same physical person has been made, the fields related to the device salesperson and resource will be filled in automatically.
- Status. The value should be as "For initialization" or "Operates". In any other case, executing the synchronization processes is not possible.
- Mobile application. The "Merchandising" application must be selected.
- Operating system. The appropriate value must be selected, based on the device's operating system. The available values are: 2-Apple iOS, 3-Android & 4-Universal Windows Platform.
- Trace method. When importing a new device, the functionality related to the user's position recording in the GPS event file is enabled. "No recording" must be selected to disable it. The actions during which a position is recorded, as well as the entry type per action are:

Entry type	Action
14	Sales appointment-Start
6	Sales appointment-Complete
11	Sales task-Complete
10	Collection-Complete
19	Other task-Complete
20	Work on site-Arrival
21	Work on site-Start
15	Work on site-Complete
16	Replace on site-Complete
17	Preventive maintenance-Completion

Entry type	Action
7	Sales order
12	Quotation
22	Sales return note
23	Other - Sales document
24	Transfer document

The position recording process has been expanded, in order to also handle the occasion where the device GPS is disabled by the user. In this case, upon performing an action, a position recording entry is not created, but the detection of the disabled GPS is recorded as a distinct event, in the device event log.

- Last known version. It updates automatically from the application installation process with the full information of the current device version. The information displayed is: application version on the IIS server - device OS version - application version & expiration date on the device
- Communication permissions. Enables the user's right to execute online processes, without "wired" communication. The available processes are: New version download, Send-Receive data, Online business policy and Online reporting. By enabling the "All customers" option it is possible to send the full customer list, via data synchronization process.
- Substitute user. The substitute user is useful in cases when the main mobile user is unable, for any reason, to carry out the tasks assigned to them. Upon first login with the credentials of the substitute user to the ESMobile application, the initialization process is performed automatically. After the process has been completed, the substitute user can execute all scheduled tasks assigned to the main user.

Main entities

Customers

- Customer code. The customer code must be defined as auto generated. At the same time, in the "Trade account code prefix" company parameter the label referring to the code prefix should be indicated. This is required in order to be able to import a new customer to the back office. The term "new customer" refers to customers that have been primarily logged by the mobile user.
- Address data. In order to display customer addresses on the map, all address information must be updated and the longitude & latitude information must be filled in properly. A prerequisite, for the automatic completion of these data, is the activation of the company parameter "Use of the mapping services server" (GeoServer).
- Salesperson. In case we want the direct assignment of specific customers per device, the individual mobile users must be opened as salespersons and the customer-salesperson connection must be set. This connection can be set on customer level or customer address level.
- Transaction data. Given that the ESMobile application is a sales document issuing tool, special attention must be given to proper completion of customer transaction data (VAT status, shipping & payment method, pricelist & discounts etc.)
- Reminder message. In order to be able to display a message to the customer when registering a new invoice, the preferred message must be set and the corresponding document type field must be activated.
- Pricing policy data. In order for the application of the current price list to be possible, firstly the price-discounts data (price zone, pricelist, customer-item pricing category) must be properly filled in and secondly, the "Apply pricelist" document type attribute

must be enabled. Note that the ESMobile application has some limitations when it comes to differentiating prices-discounts based on pricelist. A full description of the local pricelist functionalities is available in section Salesactivities/ Order of the current manual.

- Collection data. To facilitate the process of importing collection lines, the "Payment means" field must be properly filled in. This information determines the default collection line type.
- Customer's overview. In order for some of the customer's crucial financial & commercial data to be available on the device, the execution of automation "Create and update the extended table of trade accounts" should have been scheduled (area: ESTMPDASales/ CustomerInfo).
- History data. The company parameters "Days limit for forwarding documents to mobiles" & "Migration of trade account transactions to mobile since: 'how many days ago'" determine the history period for which documents & entries shall be displayed on the device respectively. The period should be determined so as to provide the user with the necessary information, but without burdening the local database volume with unnecessary log information.
- ABC evaluation. For color marking the customers based on ABC evaluation, the company parameter "The Code of the ABC Model for Customer classification available on mobile devices" must be set.

Inventory items

- Available on mobiles. In order for an inventory item to be downloaded to the device, both its grouping factors and the item itself must be marked as "Available on mobiles".
- Available on mobile orders. In order for an inventory item to be selectable in a mobile sales document, it must be marked as "Available on mobile orders".
- Barcode. In order for an inventory item to be selected via barcode, the specific barcode should be specified in the corresponding field of the item's screen or in the multiple item codes.
- Item's comments. In order for the item's detailed comments to be available on device, the company parameter "Download comments on items" (Item_Comment_Download) must have Yes as a value.
- Commercial data. Given that the ESMobile application is an invoicing tool, special attention must be given to the proper completion of the item's commercial data (VAT category, measurement units, prices & discounts etc.).
- Base MU. In order to be able to assign the base MU as default to document lines, value 0-Basic must be specified in the field "Measurement unit type" of the document type.
- Alternative MU. In order to be able to assign the alternative MU as default to document lines, value 3-Alternative must be specified in the field "Measurement unit type" of the document type.
- Sales MU. In order to be able to assign the alternative MU as default to document lines, the preferred measurement unit must be specified to the item control policy and value 1-Sales must be specified in the field "Measurement unit type" of the document type. Note that in company parameter "Document type property- Sales" the user specifies the property that corresponds to sales. In the product implementation of the ESMobile application, the property SALES is used.
- Return MU. In order to be able to assign the return MU as default to document lines, the preferred measurement unit must be specified to the item control policy and value 2-Sales must be specified in the field "Measurement unit type" of the document type. Note that in company parameter "Document type property- Return" the user specifies the property that corresponds to returns. In the product implementation of the ESMobile application, the property RETURN is used.
- Quantity step. To increase-decrease quantity based on a standard step, the preferable step must be defined at each item's MU and the "Package" document type property must be enabled. To increase-decrease quantity by one unit, value 0 should be assigned to the step. Note that, the field of the Item MU entity (step-related) is specified in company parameter "Item MU field that determines the quantity step" (ItemUnitQuantityStepField). In the product implementation of the ESMobile application, the field "Default quantity 4" is used.

- Weight & Volume. To display sales quantity in terms of weight & volume, the corresponding item MU should be specified, as well as the weight & volume equivalence with the base measurement unit.
- Quantity decimals. To enable the differentiation of decimal points per measurement unit, the preferred decimals number must be specified at the relevant field of Measurement unit entity.
- Adjunct item. The functionality of automatic, based on item relations, importing of an adjunct item (e.g. bailment good) is enabled only via the “Online business policy” online process.
- Composite item. Available in ESMobile application documents are the composite items marked as “Set” or as “Product”. However, expanding the composite item’s main BOM can be enabled only via the “Online business policy” online process.
- Statistical data. In order for the statistical data to be available on the device, the execution of the automation concerning the update of item log data (area: ESTMPDASales/ ItemSiteHistory4), as well as of the automation concerning the update of comparative sales data (area ESTMPDASales/ MobilePeriodicsStoredProcedureCaller), should have been scheduled.

Catalogue items

- Company items. In order for a catalogue item marked as a “Company product” to be available on the device, it must be linked to an inventory item that can be downloaded to the device, while the company parameter “Catalogue available on mobile” must have value Yes.
- Competition items. In order for a catalogue item related to the competition to be available on the device, it must be marked as competition item and have the “Competition category” information filled-in. Also, the competitors must be in possession of this item and be specified as related persons to the catalogue item. Note that, the task category code that concerns the classification of competition items should be specified at company parameter “Category code for competition catalogue items”. Based on the ESMobile product implementation, the task category with code CompCat is used for classification of competition items.

Expense types

- Available on mobiles. In order for an expense type to be available on the device, it must be marked as “Available on mobile”.
- Type of expense. The appropriate “Type of expense” must be selected. This information is used to connect expense types to the relevant direct selection buttons.
- Expense code. In field “Item”, the expense code relevant to the specific expense type must be assigned. Make sure that the expenses specified in this field have the following data properly filled-in: “VAT category” and “Related supplier”. This information is used by the “auto generate EBS expense document” process.

Liquidity accounts & notes

- Auto payment account. At least one liquidity account in basic currency with automatic payment must be opened. This account is assigned, via the sync process, to collection lines of cash or note type. In case the user wishes to differentiate between various automatic payment accounts per device, the preferred liquidity account must be specified in the collection documents series related to the device.
- Bank accounts. One bank-type liquidity account must be opened, for all banks that collaborate with the company. These accounts are available to the mobile user when adding a fund transfer collection line. In order to use a specific bank accounts per customer, the preferred bank account must be specified on a customer level.
- Note code. The note code must be set as auto generated. This is required in order to be able to import a collection to the back office, which includes “note” type of lines.

Budgeting

- Customer & POS target. At least one budget sheet measuring Turnover and dimensions Trade account & Trade account branch must be opened. At the same time, the following company parameters “Merchandising: Customer and POS budget sheet profile”

(MerchandiseCustomerSiteBudgetProfile) & “Merchandising: Customer and POS budget scenario” (MerchandiseCustomerSiteBudgetScenario) must be populated with the appropriate budget sheet profile & budget scenario, correspondingly. This is required in order to be able to acquire information -via an online connection to the server- regarding the customer-POS budget.

- Salesperson target. At least one budget sheet measuring Turnover and dimension Salesperson must be opened. At the same time, the following company parameters “Merchandising: Sales representative Budget sheet type” (MerchandiseSalesRepBudgetProfile) & “Merchandising: Sales representative Budget scenario” (MerchandiseSalesRepBudgetScenario) must be populated with the appropriate budget sheet profile & budget scenario, correspondingly. Finally, a device-salesperson link must have taken place. This is required by the “Budget allocation” process, as well as the reports that, -via an online connection to the server- provide information based on the salesperson-user budget (e.g. Monthly target progress).

Task types

In order to manage tasks from the ESMobile application, the default task types that come with the EBS application are required. In order to install the default task types, the user must:

- Select the option Import data (advanced) from menu “Tools & Configuration/ Import-Export data”.
- Go to folder \\ESMigration\ESCRMZero and open the file CRM_ZeroMigration_V4.emi. Define the “Source area” for the data to be imported (\\ESMigration\ESCRMZero for the Greek version and \\ESMigration\ESCRMZero\EN for the international versions) and press the “Run” button.

EBS features

Special attention should be paid to the following configuration of the task type, as they somewhat affect the EBS application function.

International type code

Any EBS application reference to a task type is possible through the InternationalID field. However, it is also possible, using the appropriate company parameters, to intervene in the default settings of the product implementation of the InternationalID ESMobile application. Note that this feature is not available for all task types. In the following table, there is a list of the task types for which this feature is available, as well as the corresponding case-by-case company parameter.

InternationalID	Description	Company parameter
ES.SAP	Sales appointment	AppointmentInternationalID
ES.STK	Sales task	ToDoInternationalID
ES.OPP	Sales opportunity	OpportunityInternationalID
ES.COL	Cash collection	CollectionInternationalID
ES.COM	Complaint	ComplaintInternationalID

Assignment rules

The roles that have the right to perform an activity are specified in section “Assignment rules” of each task type screen. This is used in order to match the task type roles to the device resource-user ones. When a task type has been assigned to selected roles and the device resource-user has none of these roles, then the type is marked on the device as not available and this type’s activities are not downloaded to the device. In the product implementation of the ESMobile application, the role SALES is used.

Subtasks

A prerequisite for linking activities with appointments is to define the corresponding task types in the “Subtasks” area of the ES.SAP-Sales appointment task type.

ESMobile features

Specifically for the needs of the ESMobile application, the task type is "enhanced" with some additional features, whose configuration determines the behavior of other processes in the application. Note that these specific features are available only in task types where a group with the "Mobile" label (e.g. Mobile_merchandising or Mobile_Custom) has been included in the "Task group" field.

Task types

Show on Calendar	The task type behavior regarding the Calendar screen. The available values are: • 0-No. The task is not displayed on the Calendar. • 1-Show without time commitment. The task is displayed on the Calendar but the time it takes up on it is fully ignored by the bulk import appointment process. • 2-Show with time commitment. The task is displayed on the Calendar and the time it takes up on it participates in the bulk import appointment process.
Background color	The background color used to display an open task on the Calendar screen. Specifying the preferred color is possible by using the corresponding HEX number. Note that, for a completed & a canceled task, regardless of the task type, the background color used is -gray & red, correspondingly. Additionally, the background color used for an active sales appointment is -light green.
Color of text	The text color used during task display on the Calendar screen. Specifying the preferred color is possible by using the corresponding HEX number.
Preparation time	Determines the task's default preparation time (minutes). This information is used by the bulk import appointment processes, as an interval between two appointments.
Usual duration	Determines the task's default duration (minutes).
Task means	The default, when creating a new task, means of executing it.
Signature	Determines whether, the customer signature screen appears when closing a task. The available values are: • 0-No signature. The signature screen does not appear. • 1-Optional signature. Providing a signature is optional. • 2-Mandatory signature. Providing a signature is required. In case the customer refuses to sign, a default image file that signals signature refusal is automatically attached.
Grouping field	Determines the field to be used as the task lines grouping criterion.
Same item behavior	Determines the effect of adding an already existing item to the item task. Exclusively for task types with lines. The available values are: • 0-New line. Adds a new line. • 1-Warning. Adds a new line and displays a relevant warning message. • 2-Prohibition. Displays a relevant prohibitive message. • 3-Add. Adds quantity to an existing line.
Number of days	Determines the preferred number of days to send scheduled tasks (Future tasks) and completed tasks (Closed tasks) from the server to the device.
Check action New...	Exclusively for the appointment duration monitoring process. Detailed instructions on this process are available in section Appointment management/ Calendar/ Appointment handling of the present manual.
Save - Options	The save options when importing-modifying a task. The available values - multiple options are possible - are: • 1-Save. Save task without changing the status. • 2-Complete. Save task while also changing the status to Completed. • 3-Cancel. Save task while also changing the status to Canceled. • 4-Create document. Save task while also changing the status to Completed and being able to directly call the import sales order process. Exclusively for the ES.MCH-Counting task type.
Deny intervention level	The intervention check level for a completed task. The available values are: • 0-No check. Check not activated. • 1-Upon completion. Prohibits intervention to the data of a task with status "Completed". • 2-Upon signature. Prohibits intervention to the data of a task with status "Completed", for which a signature has also been attached.

Settings per ESMobile application

It is possible to have different task type settings on each specific ESMobile application. This feature concerns only installations where more than one ESMobile application is functioning, in the same company.

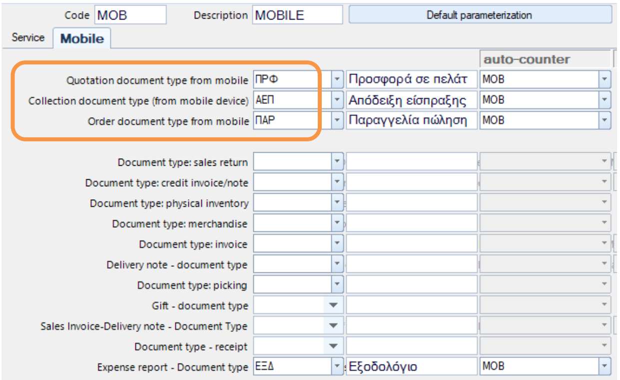
Managing the settings per application is possible from the relevant area (section: Settings per application) of the task type management screen (menu: Tools & Configuration/ Configuration/ Mobile devices/ Task types).

To import a new entry, click on -Import settings. On the screen that appears, select the preferred ESMobile application and press "Accept". At this stage, the entry will be imported for the selected application as an exact copy of the current task type. Then, by going to the management screen of this entry, change only the settings you wish to be different in this specific application. To facilitate the preview of the different settings, the "settings per application" area only displays the ones with a different value.

Document types & series

To activate the ESMobile application's functionality for document management, the existence of the default document types that accompany EBS, as well as specifying the preferred, per document type, document series are a prerequisite. Of all the document types available in the ESMobile SFA application are: 0-Sales quotation, 1-Sales order, 2-Returns note, 9-Gift note & 51-Cash receipt.

For the installation process of the default document types, exactly the same applies as what is described in section "Task types". The process of assigning the preferred document series is different, depending on whether the ESMobile app is used as a simple registration tool or as a tool to issue documents.



- Simple registration. The document's number is generated, via the data synchronization process, once the document is logged to the back office. In this case, the document series must be specified 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 specified on a services profile level must be marked as "Auto" and must have all registration & printing checks deactivated.
- Issuing. The document's number is generated when the document is being logged to the ESMobile application and by filling in the "Series" field of the document header. In this case, the document series must be specified on a user' device level. The document issuing functionality is available to all document types of the ESMobile app. Specifically in document types for transferring stock (e.g. Return), issuing documents from the device is mandatory. Note that, the EBS document series that are assigned to the device must be marked as "Manual" and must have all registration & printing checks deactivated.

In this section you can find all the document type-series configuration that play an integral part in the proper function of the ESMobile app, to ensure the required attention that must be paid.

EBS features

Special attention should be paid to the following configuration of the document series, as it somewhat affects the EBS application function.

- Type. In order to ensure the smooth operation of the data delivery process, the series to be used during the simple registration of a document must be set as "Auto". On the contrary, the series to be used when the document is being issues must be set as "Manual".
- Registration & printing checks. In order to ensure the smooth operation of the data delivery process, the registration & printing checks must be fully disabled.
- Number of print copies. Determines the amount of copies when printing a document from the ESMobile application.

ESMobile features

In this section the document type-series settings can be found, that only concern ESMobile application operations.

Document type

Check action New...	Exclusively for the appointment duration monitoring process. Detailed instructions on this process are available in section Appointment management/ Calendar/ Appointment handling of the present manual.
Measurement unit type	Determines the document's line default item measurement unit. The available values are: 0-Basic, 1-Sales, 2-Return and 3-Alternative. In case type 1-Sales or 2-Return is selected, a corresponding setup is required -from the back office- in the item control policy. Instructions for the setup are available in section EBS application configuration/ Main entities/ Inventory items of the present manual.
Package	Determines whether the functionality of step quantity is activated.
Stock level check	Determines whether, upon inserting an item to the document, the check of its stock availability is automatically activated. The available values are: 0-No, 1-Warning and 2-Prohibition.
Same item behavior	Determines the effect of adding an already existing item to the document. The available values are: • 0-Add. Adds quantity to an existing line • 1-New line. Adds a new line. • 2-Warning. Adds a new line and displays a relevant warning message. • 3-Prohibition. Displays a relevant prohibitive message.
Restriction from note	Determines whether the item investigation list will be restricted, based on the selected in the Item proposal note.
Show reminder message	Determines whether a default message will be displayed to the customer, when logging a new document.
Manage lots	Functionality not available in the ESMobile SFA application.
Pricing zone	Determines which of the five alternative item Values will be selected in the document line as the default Base price. Work in conjunction with the relevant customer field, while respecting the rule that stipulates the customer pricing zone overrides document type one, except in case the customer does not have a specific pricing zone. The available values are: 0-None, 1-Wholesale, 2-Retail, 3-Price 1, 4-Price 2 and 5-Price 3. Note that it is possible the pricelist application process leads to another default Base price.
Apply pricelist	Determines whether the price-discount calculation will be activated in the document line, based on the local pricelist data.
Online business policy	Determines whether the "Online business policy" action will be available on the document screen.
Auto apply	Determines whether, upon saving the document, the "Online business policy" action is activated automatically.
Apply credit policy	Functionality not available in the ESMobile SFA application.
Print command	The ESMobile app name of the file concerning the document print command. It should be noted here, that if the document type has series, the setting in the relevant field of the default document series overrides all.
Signature	Determines whether, upon saving a document, the customer signature screen appears. The available values are: • 0-No signature. The signature screen does not appear. • 1-Optional signature. Providing a signature is optional. • 2-Mandatory signature. Providing a signature is required. In case the customer refuses to sign, a default image file that signals signature refusal is automatically attached. It should be noted here, that if the document type has series, the setting in the relevant field of the default document series overrides all.
Save online	Determines whether the "Save to server" action is available on the document screen. It should be noted here, that if the document to be saved has a series, saving it to the server is not allowed.
Send values	Determines whether prices & discounts of documents logged in the ESMobile application will be sent, when sending a sales document to the server. By specifying value 0-No, only the quantitative data of the document are sent to the server and based on these the document overview is then formed, taking into account both the pricing policy in force (pricelist & discounts) and the commercial policy terms. Exempted are the document lines referring to a template order or an offer agreement, as well as the documents whose online business policy results have been accepted and saved. In these cases the values are always sent, regardless of the field's value.
Send upon saving	Determines whether, upon saving the document, the process of data delivery to the server is also automatically activated. The available values are:

	• 0-No. The document is not sent. • 1-Send. Sends the current document. • 2-Send all. Sends all unsent documents.

Document series templates

Every document type is accompanied by three default document series templates: Auto, Manual and Cancellation. Naturally, the series templates are only used in case the document is issued by the ESMobile app.

Manual	Determines whether the user of the ESMobile app is allowed to intervene to the number of the document to be issued.
Cancellation	Functionality not available in the ESMobile SFA application.
Registration checks	Determines whether the registration checks (Allows gaps in numbering & Sequential dates) are activated when issuing a document via the ESMobile app.
Print option	Determines whether the functionality of document printing is automatically activated, upon document save. The available values are: 0-Direct, 1-With question & 2-No.
Print command	The ESMobile app name of the file concerning the document print command.
Printing checks	Determines whether the printing checks (Official printout, Read only) are activated when printing a document via the ESMobile application.
Signature	Determines whether, upon saving a document, the customer signature screen appears. The available values are: • 0-No signature. The signature screen does not appear. • 1-Optional signature. Providing a signature is optional. • 2-Mandatory signature. Providing a signature is required. In case the customer refuses to sign, a default image file that signals signature refusal is automatically attached. Note that, under conditions, it is possible to display the signature screen. Detailed instructions on how to utilize this feature - at an application customization level - are provided in section Data entry screens/ Master-detail entity (DocForm/ Advanced Functionality) of manual MOB-ImplementationGuide.

Settings per ESMobile application

It is possible to have different document type settings on each specific ESMobile application. This feature concerns only installations where more than one ESMobile application is functioning, in the same company.

Managing the settings per application is possible from the relevant area (section: Settings per application) of the document type management screen (menu: Tools & Configuration/ Configuration/ Mobile devices/ Document types).

To import a new entry, click on -Import settings. On the screen that appears, select the preferred ESMobile application and press “Accept”. At this stage, the entry will be imported for the selected application as an exact copy of the current document type. Then, by going to the management screen of this entry, change only the settings you wish to be different in this specific application. To facilitate the preview of the different settings, the “settings per application” area only displays the ones with a different value.

Online reports

The requirements that need to be met - at an installation level - in order for the ESAnalyzer to be used as a tool to call the online reports, are:

- Be able to execute the application Entersoft Online reports for Mobile Applications (ESAnalyzer).
- A sub-folder to exist in area HybridWebReports of the application, with the files of the current ESAnalyzer version, which, at this stage, is the 3.0.10.
- The relevant public query to exist in area ESPublicQueries or CSPublicQueries of the EBS application, for each EBS scroller that concerns an online report.
- The following mobile parameters must have been filled in accordingly. Note that, specifically on iOS platforms and in order to ensure compatibility with previous versions, by leaving the contents of these parameters empty, the use of ESAnalyzer as a tool to call the online reports is not "activated".

Mobile parameter	Value
HybridOnlineReports_BridgeID	…
HybridOnlineReports_Host	api.entersoft.gr
HybridOnlineReports_SubscriptionID	…
HybridOnlineReports_SubscriptionPassword	…
HybridOnlineReports_Version	3.0.10