

# Resco MobileBusiness ESP

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## USER GUIDE

## INTRODUCTION

Welcome to the MobileBusiness ESP User Guide.

The purpose of this document is to explain the conceptual model of the application and to describe and document available features.

The first chapter explains how the application information is organized and connected. It explains the main concepts of the underlying data structure of the application. These concepts will be used throughout the document.

The second chapter explains the application user interface and available features. It is broken down into subchapters, each describing a particular application form. Numerous screenshots are provided along with descriptions of what each UI element does. You can virtually navigate through the application by following the provided links.

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# 1 MOBILEBUSINESS DATA

The MobileBusiness application focuses on customers. It allows you to manage your work related calendar where you can schedule business visits with a customer. You can quickly reach a customer by adding contacts to a customer. And of course you can review and place orders for a customer. What's more your private and business appointments will never overlap thanks to the unified calendar interface. If your business contacts are already in your Pocket Outlook database, there is no need to duplicate or reenter the information, just click to bind your contact to a customer and that's it.

## 1.1 CUSTOMER

The Customers form is a list of customers uploaded from the database. The whole form supports finger touch control. Thus, to find particular customer is either a question of several finger slides or the user can use Search filter in the upper part of the screen. The Search option uses filtering function. After a single finger tap on the customer, the customer row is expanded and multiple action buttons are displayed. There are three buttons: Call that enables making a direct call, E-mail button that enables composing an e-mail, and More button that provides advanced actions.

## 1.2 ORDER

An order is a collection of [products](#) and quantities that need to be shipped to an address at a specific date. Each order has an associated [customer](#). A new order can be add as well. The New Order form consists of four tabs: Details, Products, Notes, and Signature. All information about the order, e.g. shipping date, shipping method, shipping address can be set In the Details tab. In the Products tab there is the option to add desired products and set their volume. The Notes tab gives opportunity to add notes. The Signature tab enables order confirmation by electronic signature.

## 1.3 CONTACT

Contact information of a person, which can be reached by phone, email, etc. A *business contact* is contact stored in the application database and associated with a [customer](#). *Outlook contacts* are stored in the Pocket Outlook database.

To *bind* an outlook contact means to associate it with a [customer](#). In order to achieve that, the application writes an identifier into the Pocket Outlook database.

## 1.4 VISIT

A (business) visit is a scheduled meeting with a [customer](#).

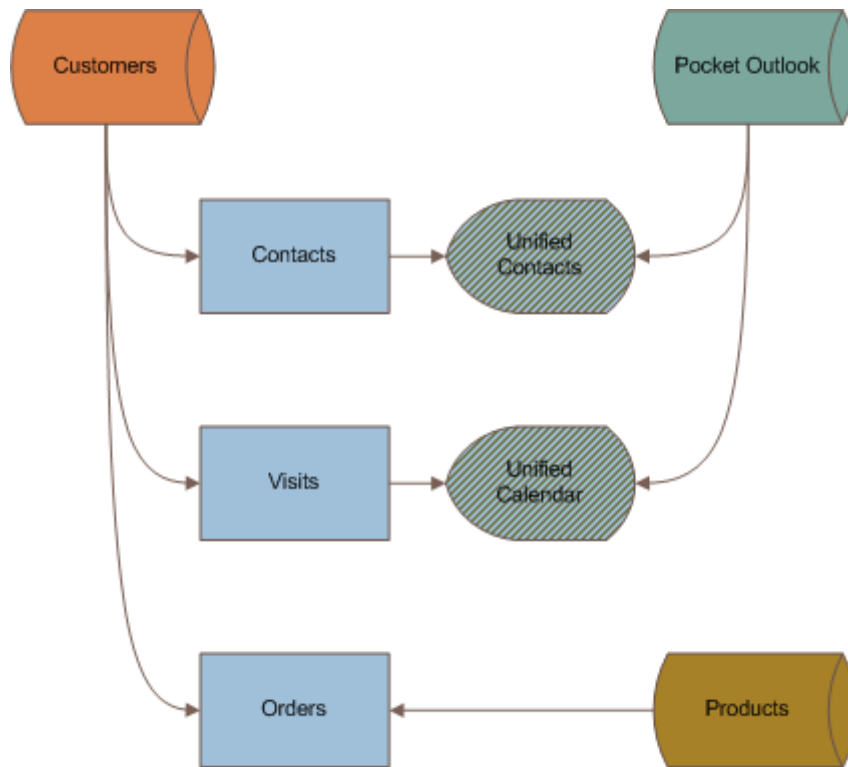
## 1.5 APPOINTMENT

A scheduled event stored in the Pocket Outlook Database. Appointments are usually managed by the standard *Calendar* application.

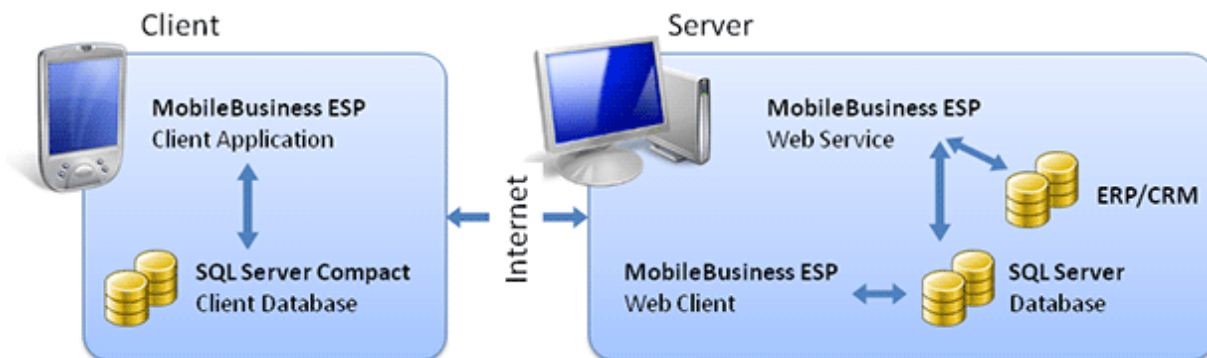
## 1.6 PRODUCT

A product is anything that can be purchased through an [order](#). Products are divided into categories.

Functional Model of the Solution:



Back-office Integration Diagram:



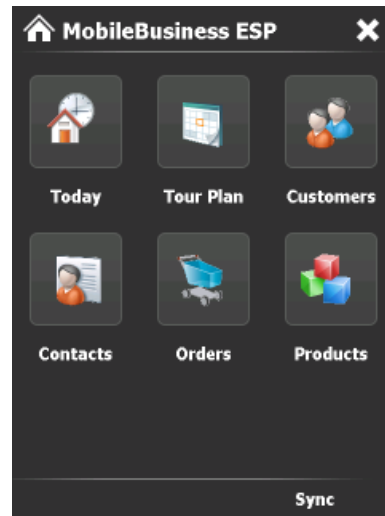
## 2 MOBILEBUSINESS USER INTERFACE

The application's user interface is provided by forms.

### 2.1 HOMEFORM

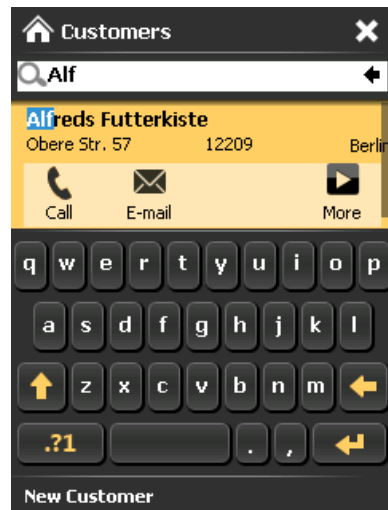
This form is the main entry point of the application and its purpose is to allow fast access to all application features.

- Click on *Today* to open the [TodayForm](#).
- Click on *Tour Plan* to open the [CalendarForm](#).
- Click on *Customers* to open the [CustomerListForm](#).
- Click on *Contacts* to open the [ContactListForm](#).
- Click on *Orders* to open [OrderListForm](#).
- Click on *Products* to open [ProductListForm](#).



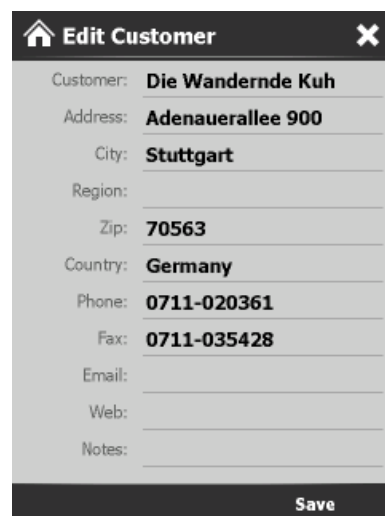
### 2.2 CUSTOMERLISTFORM

This form allows the user to quickly find a customer. It provides a one click access to a customer's contact information. It is also the main entry point for finding and editing any customer related information. Clicking on "More" opens the [CustomerDetailForm](#).



### 2.3 CUSTOMEREDITFORM

This form allows editing basic customer information as well as creating a new [customer](#).

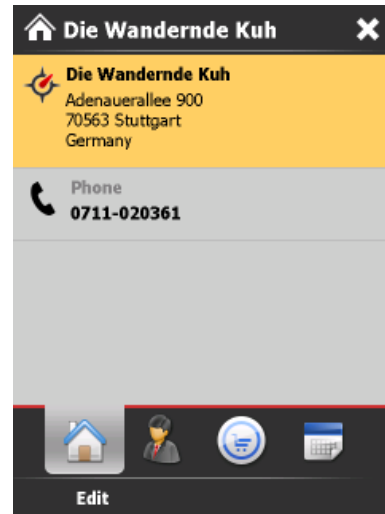


## 2.4 CUSTOMERDETAILFORM

This form is the central hub for all actions related to a customer. The form contains four tabs, where each tab is dedicated to a specific aspect of the [customer](#) management.

### 2.4.1 HOME

- Clicking on the address or the **edit** button opens the [CustomerEditForm](#).
- Call, email, or send an SMS to the customer by clicking the relevant line.

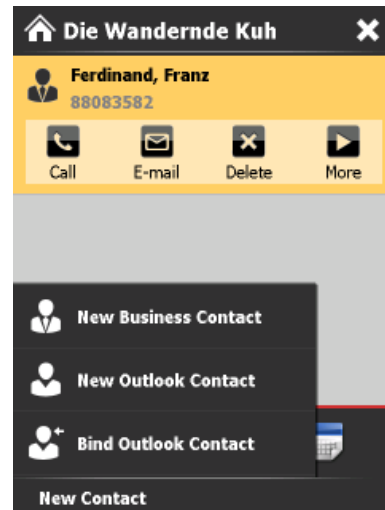


### 2.4.2 CONTACTS

- Quickly reach a specific contact related to the customer.
- **More** opens the [ContactDetailForm](#) where you can access and or edit more [contact](#) information.
- **Delete** will delete the business or outlook contact.

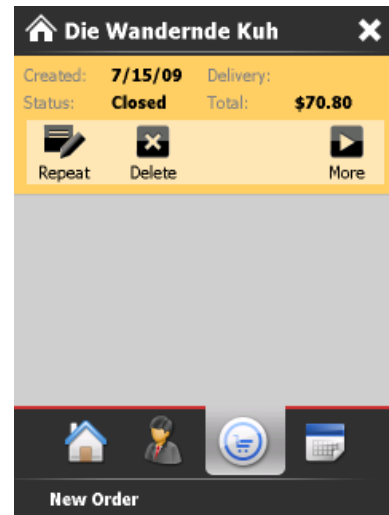
Using the **New Contact** menu you can

- Create a new business contact.
- Create a new outlook contact.
- [Bind](#) an existing outlook contact to this customer.



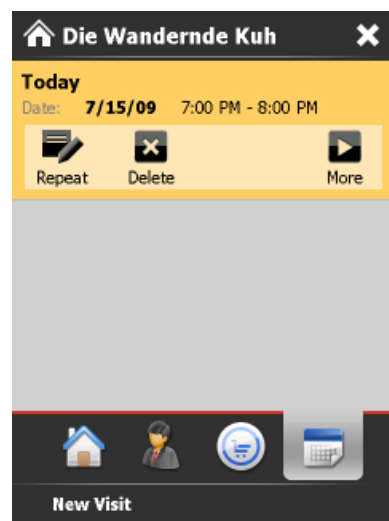
### 2.4.3 ORDERS

- Displays a list the customer [orders](#).
- **New Order** opens the [OrderEditForm](#) where you create a new order.
- Provides a quick way to repeat, delete or edit an [order](#).



### 2.4.4 VISITS

- Displays a list customer scheduled business [visits](#).
- **New Visit** opens the [VisitEditForm](#) where you create a new order.
- Repeat, delete or edit a business visit.

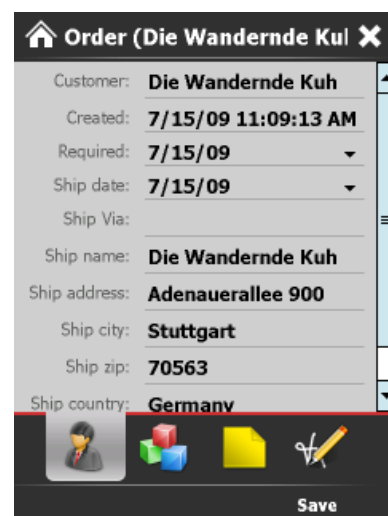


## 2.5 ORDEREDITFORM

This form provides methods to edit a new or an existing [order](#). The features are divided into four groups that are represented by graphical tabs.

### 2.5.1 HOME

- General order information, such as the billed [customer](#) the shipping address, delivery date etc.





### 2.5.2 PRODUCTS

- **New Detail** opens the [ProductListForm](#) where you can select a [product](#) to be added to this order.
- **Delete** removes a product from the order.
- Set the desired quantity of each product.

Order (Die Wandernde Kul) X

**Boston Crab Meat**  
\$18.40 x 2 Price: \$36.80

**Camembert Pierrot**  
\$34.00 x 1 Price: \$34.00

Total Price: \$70.80

New Detail Save

### 2.5.4 NOTES

- Set a simple text note regarding this order.

Order (Die Wandernde Kul) X

Notes:

A free text note  
The fish must be extra fresh!

Clear Notes Save

### 2.5.3 SIGNATURE OR FREE HAND NOTE

- Add a signature to the product or set a free hand note.

Order (Die Wandernde Kul) X

Signature:

Clear Signature Save

## 2.6 PRODUCTLISTFORM

This form allows you to browse and/or select a [product](#). You can filter the products by [category](#) and search by name or product code.

Product Name	Unit Price	Stock
Alice Mutton	\$39.00	0
Aniseed Syrup	\$10.00	13
Boston Crab Meat	\$18.40	123
Camembert Pierrot	\$34.00	19
Carnarvon Tigers	\$62.50	42
Chai		

Select

## 2.7 ORDERLISTFORM

This form lets you view all [orders](#) from a specific time span. Then, you can repeat, view or edit the order in the [OrderEditForm](#). You can also delete orders here.

Start	End
4/14/09	None

Created	Status	Delivery	Total
4/15/09	Closed		\$334.00
4/15/09	Closed		\$97.75

Repeat Delete More

New Order

## 2.8 CONTACTLISTFORM

This form allows you to quickly reach a [business contact](#) or a Pocket Outlook contact by using the list buttons.

- **More** opens the [ContactDetailForm](#) where you can access more detailed contact information on the person.

Contact Name	Phone Number
Ferdinand, Franz	88083582
Smith, John	212-401-7777

Call E-mail Delete More

New

## 2.9 CONTACTDETAILFORM

This form shows more detailed [contact](#) information. It also provides access to all communication media that are available for a particular contact.

- Clicking on the Address or the *Edit* button will open the [ContactEditForm](#), which allows you to modify any of the contact's properties.
- Clicking on the Phone, SMS or E-mail rows will use your devices phone or E-mail applications to contact the person.

**Smith, John**

**Smith, John**  
201 Varick  
10014 New York NY  
United States

**Business Phone**  
212-401-7777

**Mobile Phone**  
1-866-840-7777

**SMS**  
1-866-840-7777

**Send E-mail**  
john.smith@acmecorp.com

**Edit**

## 2.10 CONTACTEDITFORM

This form allows you to edit any of the business or Pocket Outlook [contact](#)'s properties. Note that changes to a pocket outlook contact here will be reflected in the devices built in address book as well.

**Smith, John**

Last Name: **Smith**

First Name: **John**

Job Title: **Director**

Street: **201 Varick**

City: **New York**

Region: **NY**

Zip: **10014**

Country: **United States**

Phone: **212-401-7777**

Fax:

Mobile: **1-866-840-7777**

**Save**

## 2.11 TODAYFORM

The purpose of this form is to inform you about any information that has a connection to this date. Because it mixes your private Pocket Outlook data with your business information this forms allows you to get a quick overview of your today activities.

**Today**

**Tourplan**

Last  
10/15/07 Visit: Blauer See  
Delikatessen

**Orders**

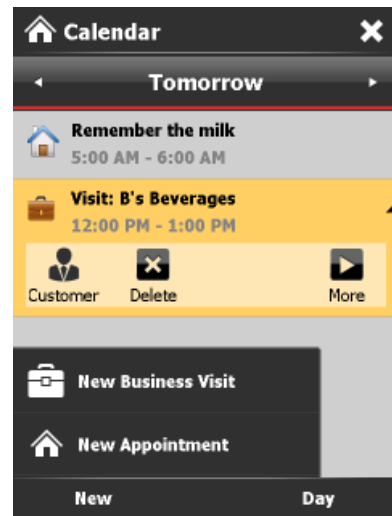
Last  
4/15/09 Around the Horn

## 2.12 CALENDARFORM

The purpose of this form is to bring together your private Pocket Outlook appointments and your [business visits](#), so that you can plan manage your private and business life safely and efficiently. The Calendar form has four separate views.

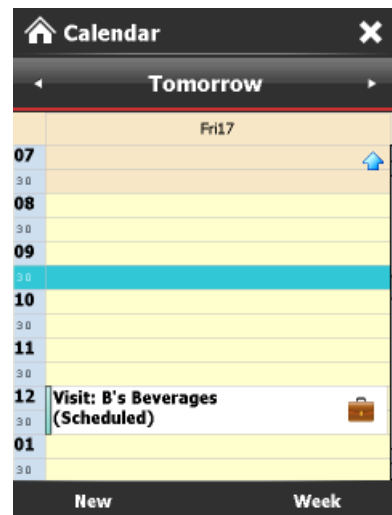
### Agenda View

Provides a specific day overview with quick action buttons.



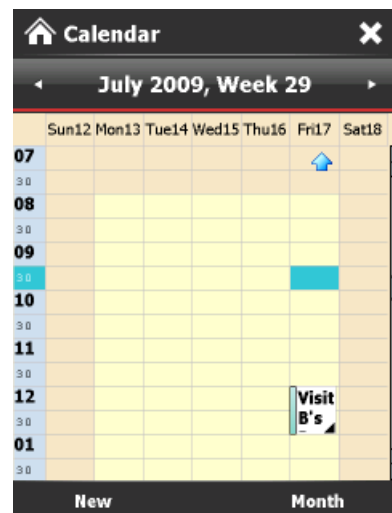
### Day View

Displays a day overview and allows you to schedule a new visit or appointment by clicking on the calendar.



### Week View

Displays a week overview and allows you to schedule a new visit or appointment by clicking on the calendar.



### Month View

Displays a month overview and allows you to schedule a new visit or appointment by clicking on the calendar.



## 2.13 APPOINTMENTEDITFORM

This form allows you to create or edit a Pocket Outlook appointment. Note that changes made here will be reflected in the Pocket Outlook Calendar application as well.

**Appointment (Remember)**  
 Subject: **Remember the milk**  
 Location:   
 Start date: **7/17/09**  
 End date: **6:00 AM**  
 Sensitivity: **Normal**  
 Status: **Busy**  
 Save

## 2.14 VISITEDITFORM

This form allows you to create or edit a [business visit](#).

**Visit (B's Beverages)**  
 Customer: **B's Beverages**  
 Start date: **7/17/09**  
 End date: **1:00 PM**  
 Status: **Scheduled**  
 Save

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Resco Headquarters: tel +421 2 209 02 019 / Fax +421 2 209 02 010

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