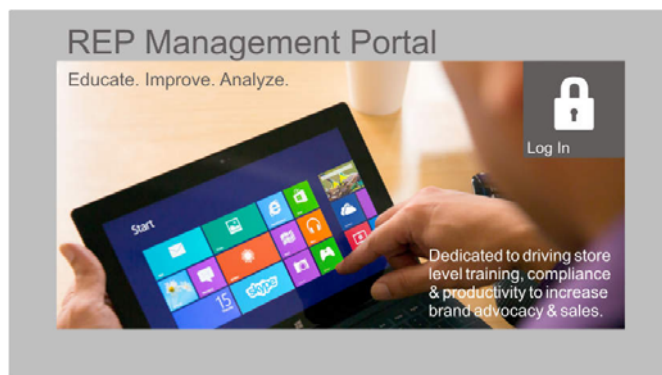




WWW.MSFTREPS.COM ADMINISTRATION GUIDE FOR



Version 1.1
July 2nd 2013

This material is subject to Non Disclosure Agreements signed by Westlake and Microsoft Corp, is noted as confidential and is not to be distributed outside of denoted parties without expressed written consent by both parties.



TABLE OF CONTENTS

OVERVIEW	4
GETTING STARTED - ROLL UP FILE	5
LOG IN - ADMIN	6
ADMINISTRATIVE MAIN PAGE	8
USER MANAGEMENT	9
Title Controls	10
Adding a New User	11
Editing an Existing User	14
Deleting an Existing User	14
STORE MANAGEMENT	15
Store Regional Hierarchy	15
Add a Level 3 Region (largest)	18
Edit a Level 3 Region (largest)	18
Delete a Level 3 Region (largest)	19
Add a Level 2 Region (middle)	19
Edit a Level 2 Region (middle)	20
Delete a Level 2 Region (middle)	20
Add a Level 1 Region (smallest)	20
Edit a Level 1 Region (smallest)	21
Delete a Level 1 Region (smallest)	21
Chains	22
Add a Chain	22
Edit a Chain	23
Delete a Chain	23
Stores	24
Add a New Store	24
Edit and Existing Store	26
Delete an Existing Store	26
ASSIGNMENTS	27
How This Works	27
CALENDAR/SCHEDULE	30
<i>Continued....</i>	

CREATE A CALL REPORT	31
Add, Edit, Delete a Form/Call Report Page	32
Add, Edit Delete a Form/Call Report Item	33
MANAGE CALL REPORTS	36
Transaction Report	36
Export Controls	38
Escalation	39
Schedule Reports	41
Configure	42
Language Tools	43
DASHBOARD	46
GPS/LOCATION BASED SERVICES	47
SETTINGS	48
CHANGE LOG	49
HELP MENU	50
CONTACT INFORMATION/SUPPORT	51
TROUBLE SHOOTING COMMON ISSUES	52

OVERVIEW

www.msftreps.com or also known as the *Rep Management Portal* was established to provide your market a flexible way to educate, analyze and improve your field force operations. The solution is expected to help track compliance and productivity, increase brand advocacy and improve sales.

Westlake Software, Inc. has been in the wireless industry for 20 years and is a global expert on field force automation and large scale deployments. Our technology is designed to be open-ended so we can help to ensure each customer is able to create as much value out of our services as possible.

In the case of www.msftreps.com, each country will be able to set up and configure their own data collection forms and in the language of choice. Most simplistically, you as the administrator will be able to re-create most any type of paperwork and dynamically populate that out to a Windows Phone supporting Windows 8. This includes store list assignments by calendar day, drop downs, check boxes, photo capture, GPS tracking and much more.

These forms can now be used by field personal to be submitted back to www.msftreps.com. The app supports store and forward, will allow you to work in and out of wireless coverage and truly support your work flow versus slowing it down.

This guide will continue to grow as new features come online. The version number of this document will change; the latest will always be posted in the online help section of www.msftreps.com.

Your feedback is welcome; both with support as well as the suggesting of new features. We are here to support you as you roll this out to your team. Our contact information is in the contact section of this document.

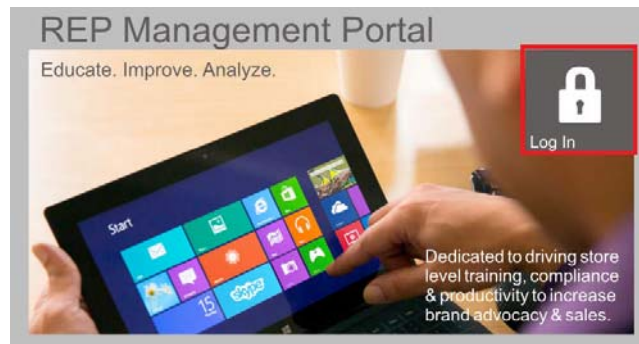
Thank you

Westlake Software, Inc.

LOGIN – ADMIN

The login and password for the initial person at your location will be provided to you to. Once you have successfully logged in, you can change your user name and password.

1. Go to: www.msftreps.com
2. Click the **Log In** Box:



3. **Enter** in the **Username** and **Password** provided to you and select the **Log In** Button:

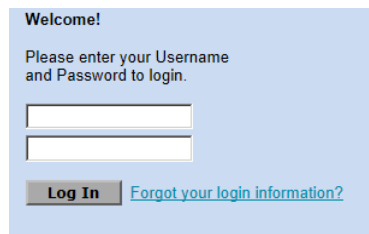
Welcome!

Please enter your Username and Password to login.

Log In [Forgot your login information?](#)

This will take you to the main landing page of the online portal.

If you forget or any user forgets their login information, you can select the *Forgot your login Information?* link.

A screenshot of a login form with a light blue background. At the top, it says "Welcome!". Below that, it says "Please enter your Username and Password to login." There are two input fields: the top one is for the username and the bottom one is for the password. At the bottom left, there is a "Log In" button. To the right of the button is a blue hyperlink that says "Forgot your login information?".

Welcome!

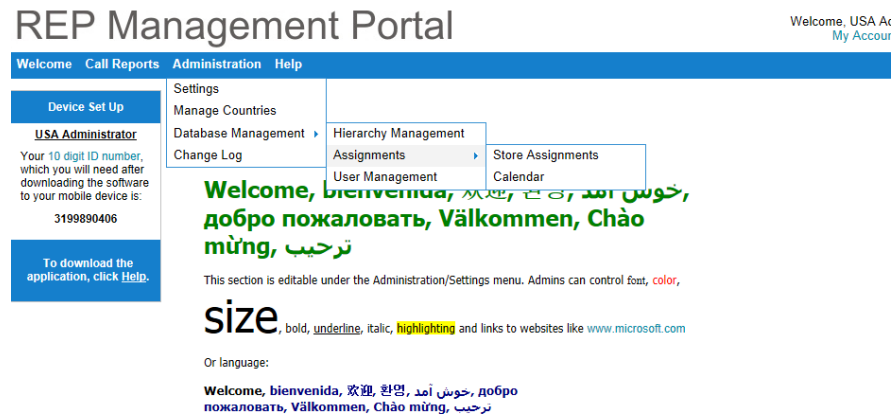
Please enter your Username
and Password to login.

 [Forgot your login information?](#)

This link will navigate a way for you to email yourself your access info.

ADMINISTRATIVE MAIN PAGE

As an Administrator, you will have access to modify many aspects of this portal to make it your own; access to everything is off the main landing page shown below.



Welcome Menu – This is your landing/home page after login in. This can be accessed at any time by selecting Welcome on the menu bar.

Call Reports Menu – This section is where you can access the data being collected by any call report you create as well as where you initially create your own call reports.

Administration Menu – As shown above, all aspects of the database, calendar controls, store assignments, stores, regions, etc. are all accessed through the Admin menu.

Help – This is where relevant documents will be stored (including this one), roll up file, guides, etc. Documents will be posted in MS Word so they can be modified by the Administrator for whatever purpose (make your own guide, localize, etc.).

My Account – Very upper right link allows you to modify your user name and password, email address, etc.

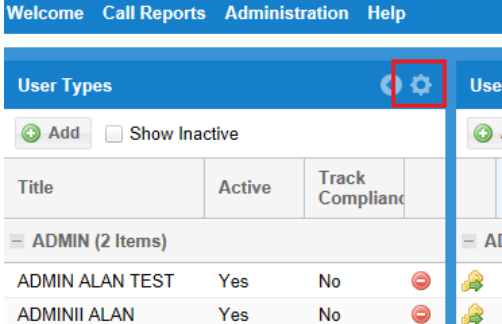
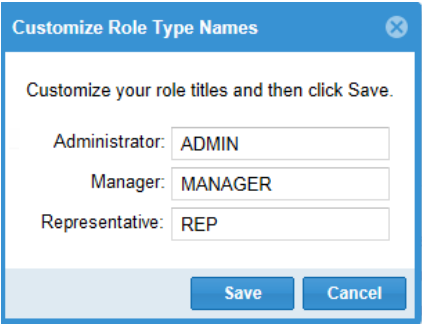
Device Set-up Box (on the left below the Welcome menu) – For each user of the system, we randomly assign a 10 digit ID number to. Each user who logs in online will have a different number but will always be visible here. This ID number is needed to set up the handset once the client application has been installed.

Text on the Main Welcome Page – is editable for your country and by you as the Administrator. See section in this document called Settings.

Title Controls

We enable you to change the titles of Administrator, Manager and Representative. The rules in which govern access, etc. are not editable, but the titles are.

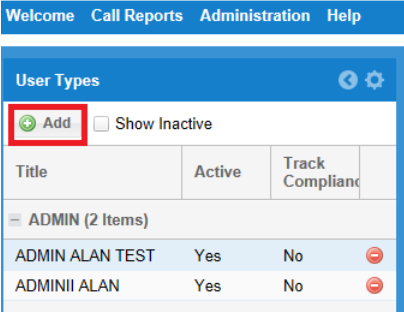
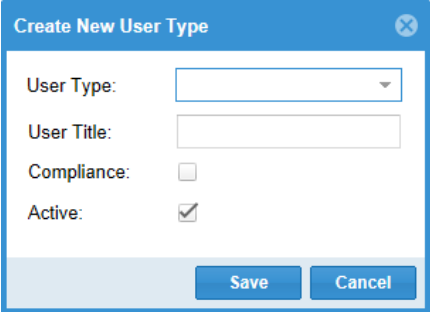
Click the Star icon (denoted in red) to display the title configuration screen.

Select Star Icon	Change the Titles of the 3 Tiers
 The screenshot shows the 'User Types' table in the Administration section. The star icon in the top right corner of the table is highlighted with a red square.	 The 'Customize Role Type Names' dialog box allows you to change the titles for Administrator, Manager, and Representative. The current titles are ADMIN, MANAGER, and REP. There are Save and Cancel buttons at the bottom.

The idea here is that if in your country it is more appropriate to call an Administrator a Director or a Representative an Executive for example; you can change this to more accurately describe your rolls.

Going one level further, you may also have different types of managers and different types of reps. For example, you may have a representative that is a dedicated trainer and another one who is dedicated to special events and another that may be an expert on just Surface. This is where you can denote these differences.

Select the Add button to Create a New User type. This will display the Create a New User Title box shown on the right.

Select Add Button	Change the Titles of the 3 Tiers
 The screenshot shows the 'User Types' table. The 'Add' button, represented by a green plus icon, is highlighted with a red square.	 The 'Create New User Type' dialog box allows you to create a new user type. It includes a dropdown for 'User Type', a text field for 'User Title', a checkbox for 'Compliance', and a checkbox for 'Active'. There are Save and Cancel buttons at the bottom.

“User Type” is a drop down menu of the 3 tiers (Admin, Manager, Rep). User Title is what you are now adding as a title to support any one of those 3 tiers. If you want to track store visit compliance on this particular rep type, check the

compliance box. If this is a title you use intermittently and (1) want to keep it but (2) not always have this active, you can deactivate this user type versus deleting the user type.

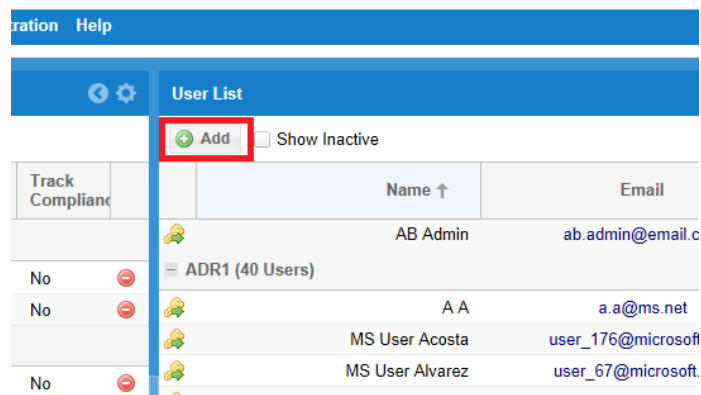
By clicking on the star icon again, you can edit your tier titles; by clicking directly on any sub title you have added to your list you can edit these titles as well. To remove a sub-title, click the red icon next to the item:



This covers the left side column of the User Management page. You can (1) change the titles of the 3 hierarchy levels supported in this system and you can (2) now create unlimited sub titles you define under each tiered section.

Adding a New User

Select the Add Button



When adding a new user, you will need to add the following data:

- First name
- Last Name
- Email
- User Name
- Password
- User Type

For the Account Information, we have two options to get a new user set up.

1. You can use our default user name and password option. If for example you name is John Smith, your initial username and password is jsmith and jsmith (first initial and last name). Once the user logs in for the first time, they are prompted to change these to a more secure settings.
2. You can create a unique username and password for this user at this time if you wish.

By selecting the Save button, this will auto-generate a 10 digit user ID number used when setting up the handset for the first time. This will display on the welcome page of each user; this can also be accessed and viewed by the Administrator when looking at Users listed in User management database.

The Active check box is a way to keep a user in the system but remove their access to the server. This might be a person on leave or someone who has been terminated where you want this off right away but not necessarily deleted.

As you add users, they will display in the title sections in which you create in the previous section as show here:

Title	Active	Track Compliance		Name ↑	Email
ADMIN (2 Items)					
ADMIN ALAN TEST	Yes	No	⊖	MS User Vasquez	user_106@microsoft.com
ADMINII ALAN	Yes	No	⊖	DM (8 Users)	
MANAGER (4 Items)					
DM	Yes	No	⊖	MS User Alexander	user_40@microsoft.com
GM	Yes	No	⊖	MS User Anderson	user_41@microsoft.com
MANAGER ALAN T...	Yes	No	⊖	MS User Branch	user_42@microsoft.com
MANAGERII ALAN	Yes	Yes	⊖	MS User Garechana	user_46@microsoft.com
REP (4 Items)					
ADR1	Yes	Yes	⊖	MS User Martinez	user_48@microsoft.com
REP ALAN TEST	Yes	Yes	⊖	MS User Park	user_49@microsoft.com
REPII ALAN	Yes	Yes	⊖	MS User Purcell	user_50@microsoft.com
TBR	Yes	Yes	⊖	MS User Revelle	user_51@microsoft.com
GM (26 Users)					
			⊖	MS User Abozied	user_54@microsoft.com
			⊖	MS User Asante	user_70@microsoft.com

Once a user has been added, you can scroll to the right in that section to view additional data about each user. This includes:

- Name
- Email
- Roll Type Last Log In
- User Name
- Active
- Track Compliance
- 10 Digit ID Number
- Device Type*
- Device Model*
- Device Firmware Version*
- AIRmobility Version (AIRmobility is our client software name)*
- Last Transaction Date*

- Registration Date
- Option to Delete the User

* This data will populate from the handset once the user has submitted their first record to the server.

Note the icon in front of each user's name:



The enables the Administrator to login as that user and access their account. This is often used by support to reset usernames and passwords if users get stuck.

Edit an Existing User

Hover over a user with your mouse and double click on an entry to edit.

User List			
Add ☐ Show Inactive			
	Name ↑	Email	Role Ty
	MS User Vasquez	user_106@microsoft.com	REP
DM (8 Users)			
	MS User Alexander	user_40@microsoft.com	MANAG
	MS User Anderson	user_41@microsoft.com	MANAG
	MS User Branch	user_42@microsoft.com	MANAG
	MS User Garechana	user_46@microsoft.com	MANAG
	MS User Martinez	user_48@microsoft.com	MANAG
	MS User Park	user_49@microsoft.com	MANAG
	MS User Purcell	user_50@microsoft.com	MANAG

Delete an Existing User

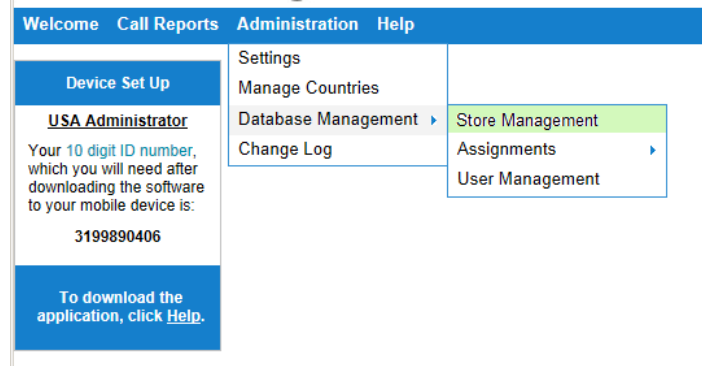
Scroll the User List all the way to the right and select the red delete icon.

User List					
Add ☐ Show Inactive					
Model	Device Firmware Version	AIRMobility Version	Last Transaction Date	Registration Date	
3113	4.1.1	2.15	06/26/2013 16:07:38	11/07/2012 20:28:12	
3113	4.1.1	2.14	06/26/2013 10:45:07	11/07/2012 20:17:28	
3113	4.1.1	2.14	05/23/2013 07:46:46	11/07/2012 20:17:28	
3113	4.1.1	2.14	06/26/2013 17:46:12	11/07/2012 20:17:28	

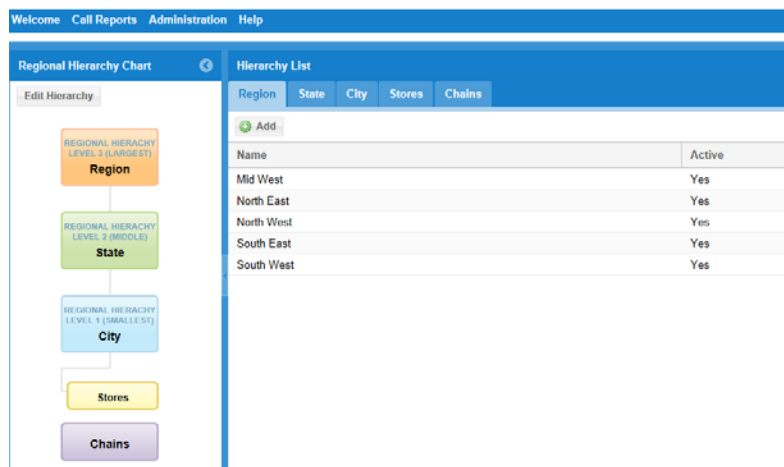
Note: Deleting a user will not delete their historical store visits in the system.

STORE MANAGEMENT

Click on the **Administration Menu**
 Scroll down to **Database Management**
 Select **Store Management**



This section enables you to add, edit and delete stores as well as place your stores into regions and territories. Similar to the User Management functions, this section is largely open ended in how you wish to define your territories, etc.

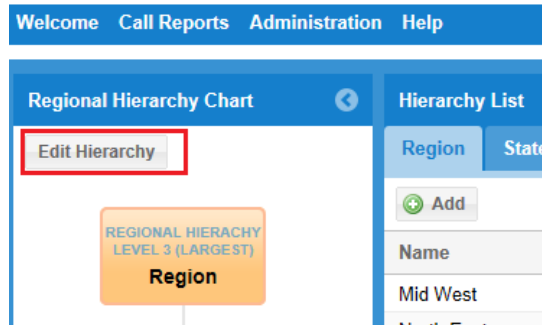


Store Regional Hierarchy

The system supports up to 3 tiers of regions. Our example in the United States shown above calls the largest area of land **Regions**, then supports **States** inside of Regions and then **Cities** inside of states. For example:

Region	Pacific North West
State	Washington
City	Redmond

You can use a single tier or up to three tiers to define the location in which a store is located. Select the Edit Hierarchy button.



Select the number of tiers in which you wish to support. Label each tier in what you wish to name it (Region, District, Market, Territory, etc.) and Save.

Select the number of hierarchy levels to use: ☐ 1 ☐ 2 ☒ 3

Level 3 (Largest)

Regional Hierarchy Level 3 (Largest):

Level 2 (Middle)

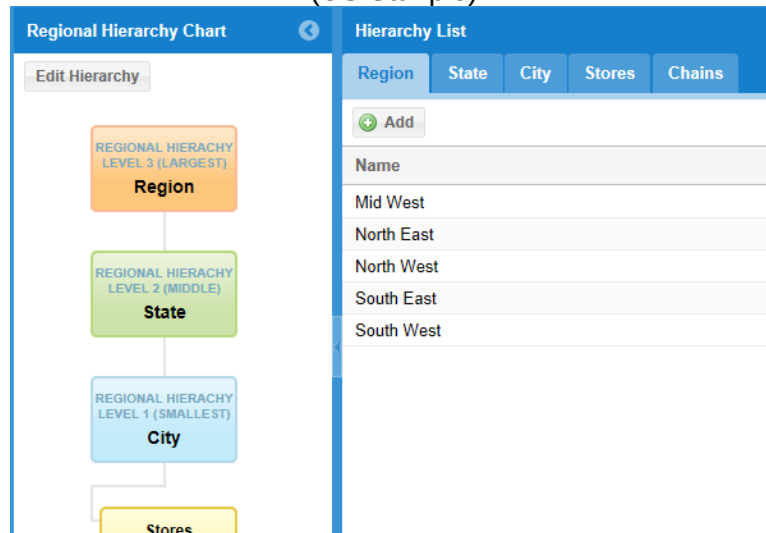
Regional Hierarchy Level 2 (Middle):

Level 1 (Smallest)

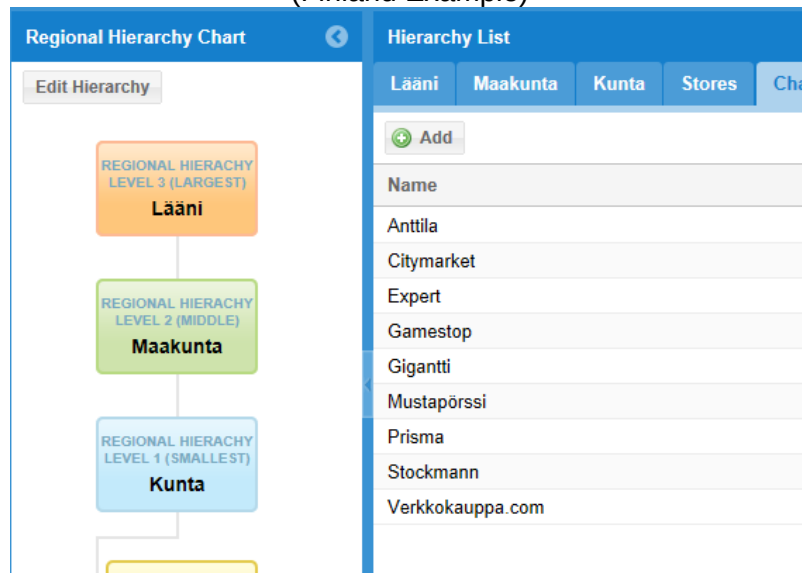
Regional Hierarchy Level 1 (Smallest):

By Saving your changes, this will change the titles on the color graphics on the left as well as change the titles of the tabs on the right.

(US Sample)



(Finland Example)



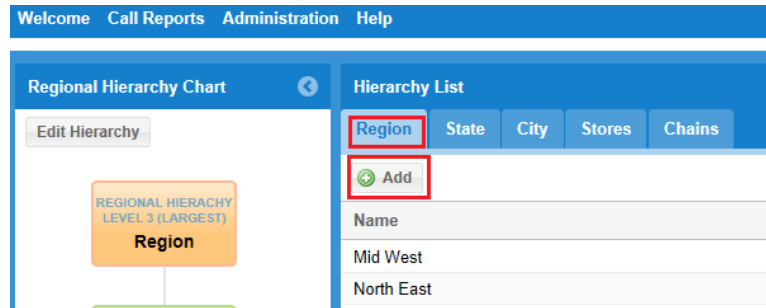
For this document, we will be referencing tabs as labeled by the United States example. Your titles/regions if you change them will be different. However, the functions to add, edit and delete will be the same.

Note, the database is relational. Higher level tiers must be added first to the system so subordinate tiers can be associated with them. For example, Pacific North West and Washington need to be in place before we can add or associate Redmond with it.

Adding a Level 3 Region (largest)

Select the **Region** Tab

Select the **Add** Button



Add the name of a Region and select **Save**.

You may also deactivate a Region, etc. versus deleting a region. This makes it so it can be used but saved if needed for later use.

The 'Add' dialog box is shown with the following fields and buttons:

- Name:** [Text input field]
- Active:** ☒
- Save** button
- Cancel** button

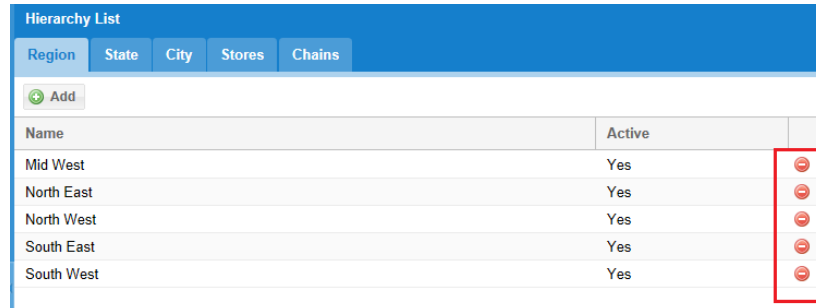
Edit a Level 3 Region (largest)

Hover your mouse over the Region you wish to edit and click:

Hierarchy List		
Region	State	City
Add		
Name	Active	
Mid West	Yes	-
North East	Yes	-
North West	Yes	-
Pacific North West	Yes	-
South East	Yes	-
South West	Yes	-

Delete a Level 3 Region (largest)

To delete a region, select the red delete icon on the right; next to the region you wish to delete.

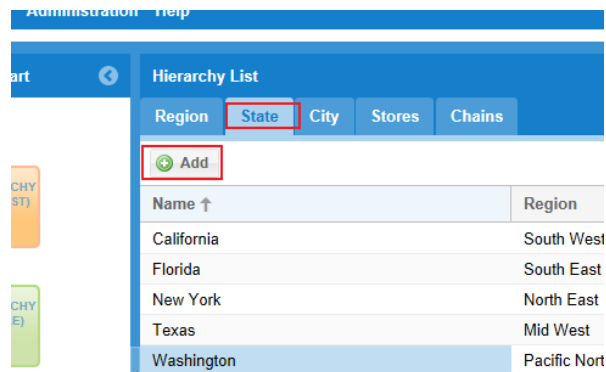


Name	Active
Mid West	Yes
North East	Yes
North West	Yes
South East	Yes
South West	Yes

Add a Level 2 Region (middle)

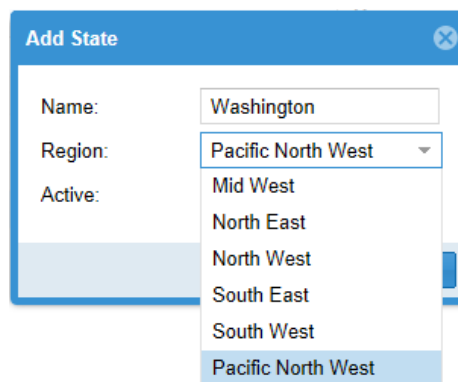
Select the **State** Tab

Select the **Add** Button



Name ↑	Region
California	South West
Florida	South East
New York	North East
Texas	Mid West
Washington	Pacific Nort

Add the Name of the State, associate the state with a Region and select Save.



Add State

Name: Washington

Region: Pacific North West

Active: Mid West, North East, North West, South East, South West, Pacific North West

You may also deactivate a State, etc. versus deleting. This makes it so it can be used but saved if needed for later use.

Edit a Level 2 Region (middle)

Hover your mouse over the State in which you wish to edit and click.

Region	State	City	Stores	Chains
Add				
Name ↑	Region	Active		
California	South West	Yes		
Florida	South East	Yes		
New York	North East	Yes		
Texas	Mid West	Yes		
Washington	Pacific North West	Yes		

Delete a Level 2 Region (middle)

To delete a State, select the delete icon on the right; next to the state in which you wish to delete.

Region	State	City	Stores	Chains
Add				
Name ↑	Region	Active		
California	South West	Yes		
Florida	South East	Yes		
New York	North East	Yes		
Texas	Mid West	Yes		
Washington	Pacific North West	Yes		

Add a Level 1 Region (smallest)

Select the City Tab

Select the Add Button

Region	State	City	Stores	Chains
Add				
Name	Region	State	Active	
Abilene			Yes	
Abilene-Wimax			Yes	
Amarillo			Yes	
Amarillo-Wimax			Yes	
Atlanta	South East	Florida	Yes	
Austin			Yes	
Baltimore	South East	Florida	Yes	

Add the Name of the City and then associate this with a State in the drop down menu.

You may also deactivate a City, etc. versus deleting. This makes it so it can be used but saved if needed for later use.

Edit a Level 1 Region (smallest)

Hover your mouse over the City in which you wish to edit and click.

Region	State	City	Stores	Chains
+ Add				
Name	Region	State	Active	
Las Vegas			Yes	-
Los Angeles			Yes	-
Los Angeles	South West	California	Yes	-
Lubbock			Yes	-

Delete a Level 1 Region (smallest)

To delete a City, select the delete icon on the right; next to the state in which you wish to delete.

Hierarchy List				
Region	State	City	Stores	Chains
+ Add				
Name	Region	State	Active	
Las Vegas			Yes	-
Los Angeles			Yes	-
Los Angeles	South West	California	Yes	-
Lubbock			Yes	-
Lubbock-Wimax			Yes	-
Maui			Yes	-
Maui-Wimax			Yes	-

Chains

You can associate a particular line of stores to a chain. For example, Walmart stores can be tied together as a chain. If you have 100 Walmart stores in your list and want to denote this as a chain, you can associate them together.

This is not a required option, but once you get into call report creation in the system, we have a way of associating call reports specifically to denoted chains if desired. The idea would be that an Administrator might want to create a form specifically for users that visits Walmart stores and only want that call report used with Walmart stores.

Add a Chain

Select the Chain Tab
Select the Add Button

Hierarchy List		
Region	State	City
Stores	Chains	
 Add		
Name	Active	
Global	Yes	
Indirect	Yes	
National Retail	Yes	
Retail	Yes	
Tiger Direct	Yes	
Unassigned	Yes	

Add the name of a Chain and select **Save**.

Create Chain

Name:

Walmart

Active:

☒

Save

Cancel

You may also deactivate a Chain, etc. versus deleting a region. This makes it so it can be used but saved if needed for later use.

Edit a Chain

Hover your mouse over the State in which you wish to edit and click.

Region	State	City	Stores	Chains
 Add				
Name	Active			
Global	Yes			
Indirect	Yes			
National Retail	Yes			
Retail	Yes			
Tiger Direct	Yes			
Unassigned	Yes			

Delete a Chain

To delete a Chain, select the delete icon on the right; next to the state in which you wish to delete.

Region	State	City	Stores	Chains
 Add				
Name	Active			
Global	Yes			
Indirect	Yes			
National Retail	Yes			
Retail	Yes			
Tiger Direct	Yes			
Unassigned	Yes			

Stores

This section manages all the stores in which you support nationally in your country. Store data is used to drive pick lists for the reps, drive store visit levels, some location based technology for mapping and more.

We display 100 stores at a time and then paginate the remaining stores. All columns can be sorted; a search feature will be added in Q4 2013. Most of your stores will have been pre-populated in the initial roll up file provided. However, we provide the ability to add, edit and delete stores from the system.

Hierarchy List				
Region	State	City	Stores	Chains
Add				
	Name	Chain	Region	State
1	#1 San Jose Pure Water - W...	Indirect		
2	\$1.00 Plus Store	Indirect		
3	\$99 Tablets	Indirect		
4	* Best Buy	Retail	South West	California
5	0-60 PC Inc	Indirect	South West	California
6	0311 Incorporated	Indirect	South West	California
7	1 Court Stationary	Indirect	South West	California
8	1 Life Communication	Indirect	South West	California
9	1 Mobile Inc	Indirect	South West	California
10	1 of 2 Wireless	Indirect	South East	Florida
11	1 Sale LLC	Indirect	South East	Florida
12	1 Stop Cellular	Indirect	Mid West	Texas
13	1 Stop Cellular and Accesso...	Indirect	South East	Florida
14	1 Ston Corporation	Indirect		

Page 1 of 108 Stores 1 - 100 to 10713

Add a New Store

Select the **Store Tab**
Select the **Add Button**

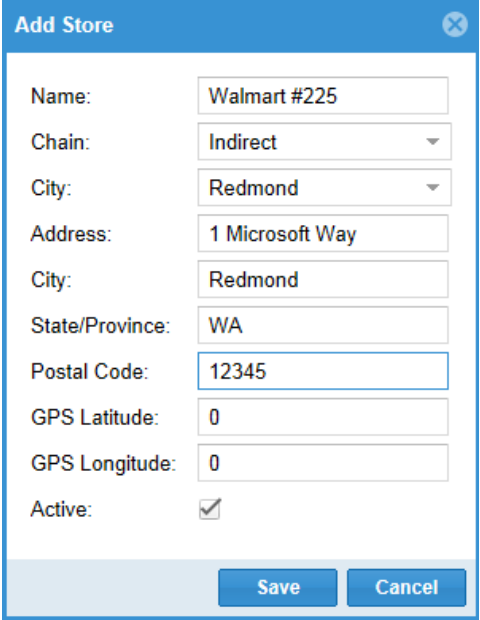
Hierarchy List				
Region	State	City	Stores	Chains
Add				
	Name	Chain	Region	State
1	#1 San Jose Pure Water - W...	Indirect		
2	\$1.00 Plus Store	Indirect		
3	\$99 Tablets	Indirect		
4	* Best Buy	Retail	South West	Californ
5	0-60 PC Inc	Indirect	South West	Californ

1. Enter in the Name of the Store (see graphic on next page)
2. Select a Chain the store is associated with (this is optional to denote a chain; using the chain function is also optional – see Chains in this document).
3. Select the tier drop down association (denoted here as City – this of course could be denoted as District were Seattle, Redmond, Kirkland, etc. are all options, etc.).
4. Enter in the Address
5. Enter in the City

6. Enter in the State, Province (please let us know at help@westlakesoftware.com if this should have another designation supported beyond State and Province).
7. Postal Code
8. GPS LAT and LONG if you have it; this is not required but will allow us display more information for you on a map server moving forward).
9. Store can be denoted as active or not in the system. Deactivating a store does not delete the store; just makes it temporarily unavailable until you reactivate it)

Name, **Address** and **Postal Code** field are used to display store selection lists on the handset for the user. The example on the right below is a bit elaborate but shows an Admin who *opted not to use the name of the store* but a Chicago, IL abbreviation with the city and street as part of the name **CHI 1165 – Northbrook.Willow**. In the case with Microsoft, we see this elaboration as likely unnecessary. We recommend that you use the name of the store in the Name field, put the number of store after this if a chain like Walmart (Walmart #1120), enter the address and postal code. This should be enough for the user to quickly identify the proper store from their list.

Whatever you decide to use as your naming convention, we do suggest that it is consistent across all stores.

View of data entry field	View of handset pick list
	

Edit an Existing Store

Hover over the store in the list and click to edit.

Hierarchy List				
Region	State	City	Stores	Chains
+ Add				
	Name	Chain	Region	State
6501	Mobile Trac 2	Indirect	South West	California
6502	Mobile Trac 3	Indirect	South West	California
6503	Mobile Trac 4	Indirect	South West	California
6504	Mobile Trendz	Indirect	South West	California
6505	Mobile Tronics Inc	Indirect	Mid West	Texas
6506	Mobile Universe Inc	Indirect	Mid West	Texas
6507	Mobile Unlimited Inc	Indirect		

Delete an Existing Store

Scroll the store detail all the way to the right and select the delete icon to remove a store from the list.

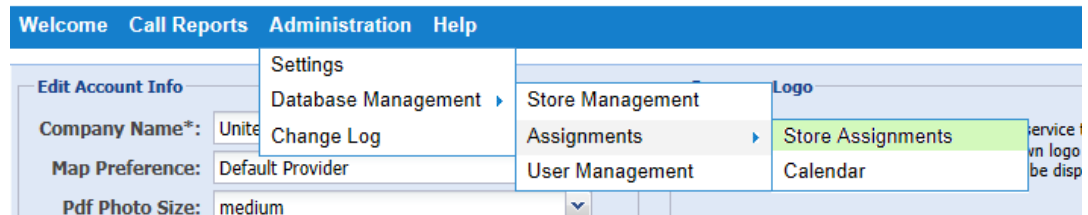
Region	State	City	Stores	Chains		
Add						
	Name		Longitude	Created	Updated	
6501	Mobile Trac 2	5	-75.148017	06-29-2013 6:36 PM		
6502	Mobile Trac 3	8	-75.203337	06-29-2013 6:36 PM		
6503	Mobile Trac 4	2	-75.122431	06-29-2013 6:36 PM		
6504	Mobile Trendz	3	-73.93093	06-29-2013 6:36 PM		
6505	Mobile Tronics Inc	5	-81.593845	06-29-2013 6:36 PM		
6506	Mobile Universe Inc	5	-93.108947	06-29-2013 6:36 PM		
6507	Mobile Unlimited Inc	8	-95.14514	06-29-2013 6:36 PM		
6508	Mobile Wholesellers	4	-76.938239	06-29-2013 6:36 PM		
6509	Mobile Wholesellers	8	-76.945353	06-29-2013 6:36 PM		
6510	Mobile World	5	-122.014854	06-29-2013 6:36 PM		
6511	Mobile World 2	7	-122.098234	06-29-2013 6:36 PM		
6512	Mobile World Of Union City Inc	4	-74.027933	06-29-2013 6:36 PM		
6513	Mobile Zone -T-Mobile	3	-75.145901	06-29-2013 6:36 PM		
6514	Mobile Zone 5th St M7	8	-75.130485	06-29-2013 6:36 PM		

ASSIGNMENTS

To start this process, you will have already needed to complete the section of adding your stores to the system as well as having added users to the system. With both completed, this section allows you to now associate users with stores.

- Stores can be assigned to more than one user
- Administrators can set the frequency in which they want each user to visit that store in a calendar month
- All store visits can be placed on an online calendar – calendar will drive the store list handset side (all stores can be accessed at any time on the handset; this just starts the display off as a daily store list by default)..

Select the **Administration Menu**
 Select **Database Management**
 Select **Assignments**
 Select **Store Assignments**

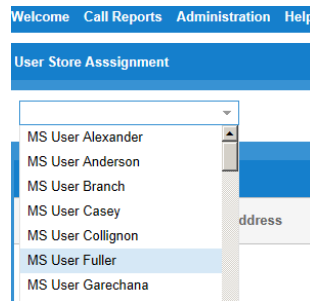


How this works

- Administrator assigns users their list of stores
- Administrator denotes the frequency in which how many times they wish that user to visit that store
- Administrator, Manager and Reprehensive can drag and drop all of the assignments denoted onto an online calendar.
- Store visit compliance is tracked daily as to the progress of the user for that month.

Available Stores				Assigned Stores		
Store Name	Address	City	State Prov	Store Name	Address	City
Best Buy	5060 Wagner Way	Oak Park	Pe	Camsa Inc.	924 71st Street	Miami Beach
* Best Buy	4345 Main Street	Los Angeles	Te	Florida Cellular of North Am...	2401 NW 2nd Ave...	Miami Gar...
6th & South	540 South Street	Philadelphia	Pe	OMG Wireless Inc	13357 SW 42 St	Miami
ABL 2954 - Abilene BuffaloG...	4310 Buffalo Gap R...	Abilene	Te	CWI PCS	742 SW 8th Street	Miami
ABL 940 - Abilene TX Best B...	4310 Buffalo Gap R...	Abilene	Te	Jozabdi Computer 2	1860 SW 8th Street	Miami
AMA 218 - Amarillo TX Best...	101 Westgate Pkwy	Amarillo	Te	ZF Communications Inc	1829 SW 8th Street	Miami
ATL 1159 - Acworth CobbPk...	3335 Cobb Pkwy NW	Acworth	Ge	Communication Link Inc	1301 Palm Ave Sult...	Hialeah
ATL 1186 - Canton Cummin...	1810 Cumming Hw...	Canton	Ge	Digital Toyz	1916 N Himes Ave	Tampa
ATL 1408 - Cumming 2085M...	2085 Market Place...	Cumming	Ge	GN Services 1	7100 SW 47th Stra	Miami
ATL 1921 - Duluth Pleasant...	2100 Pleasant Hill...	Duluth	Ge			

Start by selecting a User from the Drop Down menu:



Stores that have been added to the system are listed on the left; stores that are assigned to the user are listed on the right.

This is a drag and drop function. Drag stores from the left to right list to add them to the list of stores this user is to visit. Drag stores right to left to remove a store in which is not assigned to the rep.

AA

Available Stores				Assigned Stores		
Store Name	Address	City	State Prov	Store Name	Visits/ Month	Address
* Best Buy	4345 Main Street	Los Angeles				
6th & South	540 South Street	Philadelphia	Pe			
ABL 2954 - Abilene.BuffaloG...	4310 Buffalo Gap R...	Abilene	Te	ABL 940 - Abilene.TX Best B...	2	4310 Buffalo Gap R...
AMA 218 - Amarillo.TX Best...	101 Westgate Pkwy	Amarillo	Te	ATL 1408 - Cumming.2085M...	2	2085 Market Place...
ATL 1159 - Acworth.CobbPk...	3335 Cobb Pkwy NW	Acworth	Ge	Best Buy	1	5060 Wagner Way
ATL 1921 - Duluth.Pleasant...	2100 Pleasant Hill...	Duluth	Ge	ATL 1186 - Canton.Cummin...	1	1810 Cumming Hw...
ATL 1923 - Lithonia.TurnerH...	2929 Turner Hill Ro...	Lithonia	Ge	ATL 1924 - Buford.BufordDr...	1	3333 Buford Drive
ATL 1947 - Alpharetta.NPoin...	1000 North Point Ci...	Alpharetta	Ge	ATL 2894 - Atlanta.Cumberl...	1	1349 Cumberland...
ATL 2895 - Atlanta.Briarcliff...	4800 Briarcliff Road	Atlanta	Ge	ATL 38 - Duluth.3296Comm...	1	3065 Webb Road
ATL 32 - Milton.3065WebbR...	3296 Commerce Av...	Duluth	Ge			
ATL 389 - Atlanta.2940Turn...	2940 Turner Hill Road	Lithonia	Ge			
ATL 436 - Buford.3295Wood...	3295 Woodward Co...	Buford	Ge			

« < Page 1 of 72 > » ↻
Stores 1 - 100 to 7198

Once the stores have been added to the right, the column that displays Visits/Month is editable: click right on the Visits/month number as shown below in green.

AA

Available Stores				Assigned Stores		
Store Name	Address	City	State Prov	Store Name	Visits/ Month	Address
* Best Buy	4345 Main Street	Los Angeles				
6th & South	540 South Street	Philadelphia	Pe			
ABL 2954 - Abilene.BuffaloG...	4310 Buffalo Gap R...	Abilene	Te	ABL 940 - Abilene.TX Best B...	2	4310 Buffalo Gap R...
AMA 218 - Amarillo.TX Best...	101 Westgate Pkwy	Amarillo	Te	ATL 1408 - Cumming.2085M...	2	2085 Market Place...
ATL 1159 - Acworth.CobbPk...	3335 Cobb Pkwy NW	Acworth	Ge	Best Buy	5	5060 Wagner Way
ATL 1921 - Duluth.Pleasant...	2100 Pleasant Hill...	Duluth	Ge	ATL 1186 - Canton.Cummin...	1	1810 Cumming Hw...
ATL 1923 - Lithonia.TurnerH...	2929 Turner Hill Ro...	Lithonia	Ge	ATL 1924 - Buford.BufordDr...	1	3333 Buford Drive
ATL 1947 - Alpharetta.NPoin...	1000 North Point Ci...	Alpharetta	Ge	ATL 2894 - Atlanta.Cumberl...	1	1349 Cumberland...
ATL 2895 - Atlanta.Briarcliff...	4800 Briarcliff Road	Atlanta	Ge	ATL 38 - Duluth.3296Comm...	1	3065 Webb Road

Note: If you see that the Default Visits/Month is dithered and the Visits/Month Column is not visible, compliance for this user is turned off. Go to the User Mangement section, edit that user and turn compliance on.

MS User Anderson

Available Stores				Assigned Stores		
Store Name	Address	City	State Prov	Store Name	Address	City
Best Buy	5060 Wagner Way	Oak Park		ATL 1408 - Cumming 2085M...	2085 Market Place...	Cumming
* Best Buy	4345 Main Street	Los Angeles		ATL 32 - Milton.3065WebbR...	3296 Commerce Av...	Duluth
6th & South	540 South Street	Philadelphia	Pe	ATL 38 - Duluth.3296Comm...	3065 Webb Road	Milton
ABL 2954 - Abilene.BuffaloG...	4310 Buffalo Gap R...	Abilene	Te	ATL 389 - Atlanta 2940Turn...	2940 Turner Hill Road	Lithonia
ABL 940 - Abilene.TX Best B...	4310 Buffalo Gap R...	Abilene	Te	ATL 426 - Buford 3205Wood...	3205 Woodward Cr...	Buford
AMA 218 - Amarillo.TX Best...	101 Westgate Pkwy	Amarillo	Te	ATL 501 - Kennesaw.CobbP...	850 Cobb Place Blv...	Kennesaw
AUS 1153 - Austin BarbaraJ...	1201 Barbara Jorda...	Austin	Te	ATL 502 - Smyrna Cumberla...	2460 Cobb Pkwy SE	Smyrna
AUS 1762 - Pflugerville Lime...	1900 Limestone Co...	Pflugerville	Te			

CALENDAR/SCHEDULE

Representatives can log in and keep a calendar of their store visit dates. All stores assigned to the user are listed on the left. If a store is required to be visited more than once in a month, that store will be repeated in the list. For example, if a user is to visit Retail Super Store 4 times in August, this would list 4 times as:

Retail Super Store 1 of 4
 Retail Super Store 2 of 4
 Retail Super Store 3 of 4
 Retail Super Store 4 of 4

The screenshot shows a web interface for managing store visits. On the left, a list of stores is displayed with columns for Store Name, Visit count, and Address. The list includes stores like '1 Stop To Shop', '116 Wireless', '167 Computer Ce...', '167th Street Corp...', '1800fix - 231st', '1800fix.com 5', '20/20 Wireless Inc', '20/20 Wireless Inc', '212 NYC Wireless', '303 Canal Cellular...', '303 Canal Cellular...', '3406 Jerome Ave...', '3406 Jerome Ave...', and '3rd Ave Mini Mall'. On the right, a calendar grid shows the schedule for July 2013. The calendar grid has columns for days of the week and rows for dates. The 'Today' date is June 30, 2013, at 8:14pm. The calendar grid shows the number of visits for each day. For example, on June 30, there is 1 visit at 8:14pm. On July 1, there are 7 visits starting at 7:00am. On July 2, there are 8 visits starting at 7:00am. On July 3, there are 9 visits starting at 7:00am. On July 4, there are 10 visits starting at 7:00am. On July 5, there are 11 visits starting at 7:00am. On July 6, there are 12 visits starting at 7:00am. On July 7, there are 13 visits starting at 7:00am. On July 8, there are 14 visits starting at 7:00am. On July 9, there are 15 visits starting at 7:00am. On July 10, there are 16 visits starting at 7:00am. On July 11, there are 17 visits starting at 7:00am. On July 12, there are 18 visits starting at 7:00am. On July 13, there are 19 visits starting at 7:00am. On July 14, there are 20 visits starting at 7:00am. On July 15, there are 21 visits starting at 7:00am. On July 16, there are 22 visits starting at 7:00am. On July 17, there are 23 visits starting at 7:00am. On July 18, there are 24 visits starting at 7:00am. On July 19, there are 25 visits starting at 7:00am. On July 20, there are 26 visits starting at 7:00am. On July 21, there are 27 visits starting at 7:00am. On July 22, there are 28 visits starting at 7:00am. On July 23, there are 29 visits starting at 7:00am. On July 24, there are 30 visits starting at 7:00am. On July 25, there are 31 visits starting at 7:00am. On July 26, there are 32 visits starting at 7:00am. On July 27, there are 33 visits starting at 7:00am. On July 28, there are 34 visits starting at 7:00am. On July 29, there are 35 visits starting at 7:00am. On July 30, there are 36 visits starting at 7:00am. On July 31, there are 37 visits starting at 7:00am. On August 1, there are 38 visits starting at 7:00am. On August 2, there are 39 visits starting at 7:00am.

This is a drag and drop interface. Drag all stores assigned onto the calendar days in which they are to be visited.

We default the first visit at 7AM and list all others added at a 30 minute increment. This can be edited to more specific times; but the calendar in this implementation is a daily planner with monthly compliance requirements; times of day are not as relevant here and are would not typically be used in this deployment.

Drag all assigned stores out of the column on the left onto the calendar on the right and the month schedule is set.

Handset side, we will display the stores to be visited as a filtered list for that day. However, a user can always expand their list to see all of their stores and visit any store they desire (month end blitz, urgent matter, at a slow store wanting to move to a busier location, etc.).

Stores that are deleted from the calendar are placed back on the left side column.

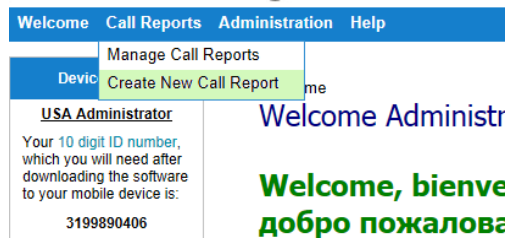
Managers, Administrators and Representatives all have access to view and edit the calendar of the Representative.

CREATE A CALL REPORT

The creation of a call report has many features and functions and is the most intricate part of this solution. There are many items available to create highly detail forms with maximum flexibility for the Administrator as well as the end user.

Select Call Reports

Select Create a New Call Report



This starts the first page of the Form/Call Report Wizard.

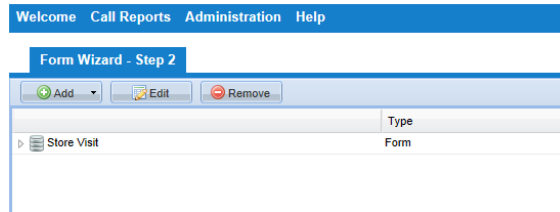
- In the Form Title box, name your new form/call report.
- There is a box to display a description but this is option and seldom used.
- You can opt to add your store list to a form or not have a store list present (some forms may not be tied to a store: expense reports, mileage, outside events at concerts or schools, etc.).
- If you are using the Chains option, you can also limit the form/call report to that denoted chain.

Select the Next Button.

This next section covers the detail in how to create an interactive, live on-the-fly call report/form. You can create pages that can swipe left and right on Windows Phone 8. Pages can be individually titled (Inventory, Merchandising, Management Interaction, Displays, Training, etc.). On each page, you can create any number of highly formatted items (photo capture, barcode reading, numeric fields, drop down lists, check boxes, etc.).

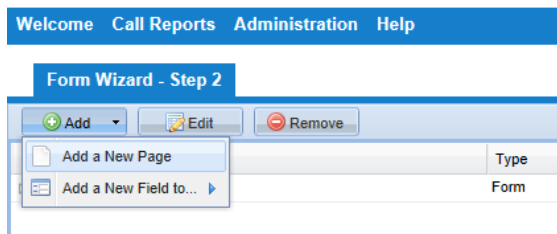
Add, Edit, Delete a Form/Call Report Page

After you have named your form and selected Next, the following user interface will appear:

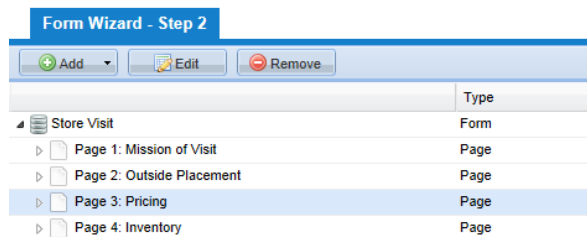


This interface enables you (1) create pages that can swipe left and right on the Window Phone 8 handset and (2) add items to each of the pages to fill out your call report from end to end.

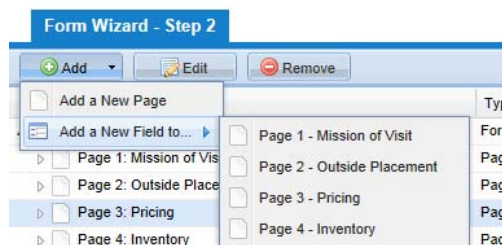
To create a new page for the phone, select the Add button. This will trigger a menu to Add a new page (label them as Training, Displays, Manager Notes, etc.).



As you add new pages, they will start to line up under the expanded carrot under your form name shown here:



To add a field (numeric, photo capture, drop down list, etc.) to a page, select the Add button but this time select Add a New Field and select the Page in which you want to add the field to:



This will trigger the interface below in which enables you to highly format a new field item entry for that page.

Add, Edit Delete a Form/Call Report Item

On each page of the call report, you can add any number of items with formatting you wish.

By clicking to *Add a new Field* to a page, the following interface will display.

The screenshot shows a web browser window with the URL <http://demo.msftreps.com/app/formWizard>. The page title is "Add a New Field" with a note "(*) indicates a required field".

1. *Prompt: Enter the words that the user will be prompted with for this field. (E.g., "How much did you bill the customer?", "Date:", "Notes:", etc. - Use punctuation as desired.)

2. *Response Type: Select the kind of response that the user can enter for this field. A detailed description appears below for the response type that is selected.

Response Type options:

- ☐ Alphanumeric
- ☒ Numeric only
- ☐ "Yes" or "No"
- ☐ Date
- ☐ Email address
- ☐ Pre-defined list of values
- ☐ Multiple-select list of values
- ☐ Large text box
- ☐ Display message
- ☐ Phone number
- ☐ Bar code
- ☐ Photo
- ☐ Signature/Drawing
- ☐ Website/URL Link Button

Numeric only: Restricts the user's response to numeric characters (0-9). This option will also set the data-entry mode on the device for numeric input for the convenience of the user.

3. Advanced Options

Required: Require the user to respond to this field? ☐ Yes ☒ No

Default Value:

- ☒ No default value.
- ☐ Always default to this value:
- ☐ Always default to the last value entered by the current user.
- ☐ Always default to the last value entered by any user on this form.

Buttons: Save Field, Cancel

1. Prompt – This is the field in which you describe what you are attempting to collect (What did you do today? Take a Photo? Was the Manager present? Did you sell an Xbox today?)

2. Response Type – this enables you to format the response type by the question being asked in the prompt. For example, of the prompt asked how many, you might use the numeric field. If how many is always 5.10. 15 or 20, I might use the Pre-defined list of values to allow the user to select from a list.

3, Advanced Options - each of the following items supports its own set of advance options. As you select each item to learn more about it, review the Advanced options online for each.

- **Alphanumeric** – This is an open ended field that support both alpha and numeric characters.

- **Numeric**- Defaults the keyboard into numeric mode
- **Yes/No** – Common response type used by our customers. Broken out into its own format.
- **Date** – All records sent to the server are date and time stamped; However, this field is often used by user to denote a follow up date for some in the future or an incident to denote something that happened in the past.
- **Email Address**- Adding email addresses to this section will send these individuals a copy of the report that is currently being completed.
- **Pre-defined List of Values** – drop down list that allows the user to select only one from a list.
- **Multiple Select List of Values** – check boxes. This enables the user to select more than one option from a list.
- **Large Text Box** – Often used for note taking. Allows for a user to be narrative and provide detail notes.
- **Display Message** – Works as a title or section break in on the page.
- **Phone Number** – offer a format for entering a phone number (US format).
- **Bar Code** – depending on your device and configuration, the application can natively support the scanning of bar code reading using the camera.
- **Photo** – Used to take photos of work performed, proof of performance, displays, etc.
- **Signature/Drawing** – displays a screen to use your finger or stylus to sign or draw.
- **Website/URL Link** – Create a button on the screen that when you click on the button, this can bring up a website, video, etc., anything online.

Once you have selected and completed an item, select Save. This will take you back to the call report/form hierarchy and now display your new item under the carrot of the page in which you denoted:

Form Wizard - Step 2	
+ Add Edit Remove	
	Type
Store Visit	Form
Page 1: Mission of Visit	Page
Page 2: Outside Placement	Page
Reason for visit	Field: List
Manager Present?	Field: Yes/No
Contact	Field: Alphanumeric
Page 3: Pricing	Page
Page 4: Inventory	Page

To Edit any item you have created, highlight the item and select the Edit button:

Form Wizard - Step 2

	Type
Store Visit	Form
Page 1: Mission of Visit	Page
Page 2: Outside Placement	Page
Reason for visit	Field: List
Manager Present?	Field: Yes/No
Contact	Field: Alphanumeric
Page 3: Pricing	Page
Page 4: Inventory	Page

To remove or delete any item you have created, highlight the item and section the Remove button:

Form Wizard - Step 2

	Type
Store Visit	Form
Page 1: Mission of Visit	Page
Page 2: Outside Placement	Page
Reason for visit	Field: List
Manager Present?	Field: Yes/No
Contact	Field: Alphanumeric
Page 3: Pricing	Page
Page 4: Inventory	Page

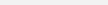
This is the bases of the form/call report feature. More documentation will be added in the next version of this document.

MANAGE CALL REPORTS

Manage call reports section is where you can view the data collected by users, display data with phones in a PDF formatted report, export data to Excel and more.

Select Call Reports Menu Select Manage Call Reports

Welcome	Call Reports	Administration	Help
	Manage Call Reports		
	Create New Call Report		
Language Test		Transaction Report	
Store Visit		Transaction Report	

Welcome Call Reports Administration Help						
Form		Options				
Language Test		Transaction Report	Escalation	Schedule Reports	Configure	Language Tools
 Store Visit		Transaction Report	Escalation	Schedule Reports	Configure	Language Tools

Each call report is listed down the left side of the page. The tools and controls for each form are noted next to it to the right.

Transaction Report

Transaction Reports are your “online spreadsheets” to view collected data and to export data.

Select Call Reports Menu Select Manage Call Reports Select Transaction Report next to the form in which you want to access data

Welcome	Call Reports	Administration	Help
	Manage Call Reports		
	Create New Call Report		
Language Test		Transaction Report	
Store Visit		Transaction Report	

Welcome Call Reports Administration Help					
Form		Options			
Language Test	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools
 Store Visit	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools

Select the **date range** in which you want to view data, narrow your view by rep or by default, display all, and **select the Get Results** button.

Welcome Call Reports Administration Help

Back to Form List Transaction Report: *Language Test (English)*

From: 06/30/2013 To: 06/30/2013 User Name: All Language: English Get Results

Export to MS Excel

Denote how many records to display per page

From: 06/21/2013 To: 06/21/2013 User Name: All Language: English Get Results

Page 1 of 15 Results per page: 25 Display

	Device	First Name	Last Name	Received	Latitude	Longitude	Region
1	886 631 8910	MS User	Ordaz	21, 2013 11:44:41 PM	Unavailable	Unavailable	
2	326 587 8247	MS User	Khounthavong	21, 2013 08:53:56 PM	45.5230747552708	-122.695963845529	
3	675 794 9178	MS User	Rivera	Fri, Jun 21, 2013 08:12:46 PM	Unavailable	Unavailable	
4	675 794 9178	MS User	Rivera	Fri, Jun 21, 2013 07:18:34 PM	Unavailable	Unavailable	
5	929 967 2498	MS User	Garcia	Fri, Jun 21, 2013 07:17:08 PM	32.7631693958387	-96.9002487494665	
6	392 217 0321	MS User	Garra	Fri, Jun 21, 2013 07:09:30 PM	Unavailable	Unavailable	
7	960 048 7433	MS User	Yee	Fri, Jun 21, 2013 06:59:35 PM	Unavailable	Unavailable	
8	403 204 4651	MS User	Park	Fri, Jun 21, 2013 06:58:52 PM	21.2798507217882	-157.826793003034	
9	403 204 4651	MS User	Park	Fri, Jun 21, 2013 06:46:44 PM	21.2802892072927	-157.828203702964	
10	392 217 0321	MS User	Garra	Fri, Jun 21, 2013 06:42:25 PM	Unavailable	Unavailable	
11	953-182-7978	MS User	Gatling	Fri, Jun 21, 2013 06:40:42 PM	Unavailable	Unavailable	South East
12	960 048 7433	MS User	Yee	Fri, Jun 21, 2013 06:39:17 PM	Unavailable	Unavailable	
13	392 217 0321	MS User	Garra	Fri, Jun 21, 2013 06:19:56 PM	Unavailable	Unavailable	
14	402 435 3819	MS User	Hussain	Fri, Jun 21, 2013 06:15:39 PM	Unavailable	Unavailable	
15	759 066 2060	MS User	Santos	Fri, Jun 21, 2013 06:12:45 PM	40.8928463638481	-74.1650586214382	South West C
16	759 066 2060	MS User	Santos	Fri, Jun 21, 2013 06:11:22 PM	40.8927542582821	-74.1650515559862	South West C
17	675 794 9178	MS User	Rivera	Fri, Jun 21, 2013 06:11:08 PM	Unavailable	Unavailable	
18	759 066 2060	MS User	Santos	Fri, Jun 21, 2013 06:06:29 PM	40.8928276618495	-74.16512197254	South West C

Display record in a formatted PDF Report

Plot transaction on a Map

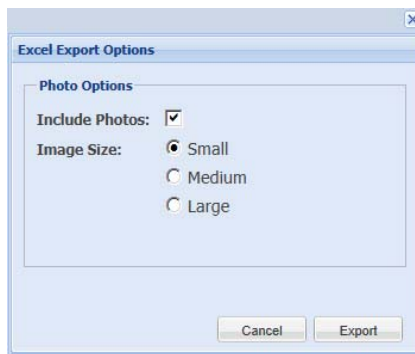
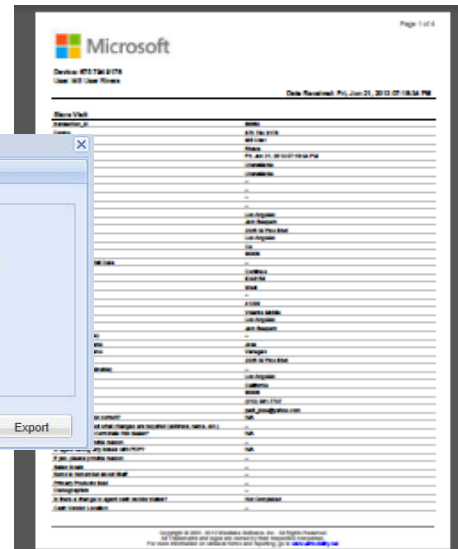
Note: the entire call report is listed across the page as the this page will scroll to whatever length necessary to show all data.

Export Controls

Call Reports exported to a PDF Report
And as an XLS File.

PDF reports have some formatting options.

XLS export can support information with or
Without photos.



Transaction ID							
	B	C	D	E	F	G	H
16	85857	238 091 0815	MS User	Brannon	06/20/2013 08:07:54	30.3533836842802	-81.7309825133769
17	86310	596 032 1408	MS User	Hubbell	06/20/2013 08:09:05	38.5994151986248	-90.450132227121
18	85759	367 198 5703	MS User	Conde	06/20/2013 08:09:35	26.0105912158325	-80.2015080723604
19	85758	772 493 9813	MS User	Sanchez	06/20/2013 08:12:37	40.7283535713677	-73.9532242530895
20	85760	606 971 6360	MS User	McQuaid	06/20/2013 08:13:58	39.93097715	-75.08165497
21	85762	619 542 6081	MS User	Mallory	06/20/2013 08:15:44	Unavailable	Unavailable
22	85764	463 774 9034	MS User	Barone	06/20/2013 08:17:25	33.5828841351059	-84.4119352198908
23	85763	378 781 4165	MS User	Dingle	06/20/2013 08:18:21	Unavailable	Unavailable
24	85953	891 312 4411	MS User	Smith	06/20/2013 08:18:22	40.4021567164998	-79.7758272410129
25	85767	553 057 5532	MS User	Crow	06/20/2013 08:19:12	Unavailable	Unavailable

Escalation

Once you have created a call report you plan to use, this option enables you to set a one-off trigger/alert when an item on your form is matched to your tracking criteria. You may have a question such as “Does this require immediate Microsoft Assistance?” defaulted to No. But when checked Yes, this would email anyone and everyone on your created list to be notified with the entire store transaction report attached.

Select Call Reports Menu

Select Manage Call Reports

Select **Escalation** next to the form in which you want to access data

Welcome	Call Reports	Administration	Help
	Manage Call Reports		
	Create New Call Report		
Language Test		Transaction Report	
Store Visit		Transaction Report	

Welcome Call Reports Administration Help					
Form		Options			
Language Test	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools
 Store Visit	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools

Click on Create a New Escalation Alert:

[Create a New Escalation Alert](#)

Your escalation alert list is empty. Click the link above to set up your first escalation alert

Step 1 – Name the Escalation for reference. If you are created an escalation to denote low inventory from an inventory question, you might call this “Inventory Low Alert.” It is common for the Task name and the Email subject line (what the alert will say on the email subject line when sent to you) to be the same. Few individuals ever put any data in the Email message box (just there if needed).

Step 1 - Name / Email Info

Name This Task and Set Email Information

1. *Name: Select a name to identify this task. This name will show up in the task list so that you can review, edit or delete the task at a later time.
Task Name:

2. Email Subject (optional): When this alert or report is triggered, an email will be sent out to the addresses you choose (in Step 2). Enter the subject line that you want to appear in these email messages.
Email Subject:

3. Email Message (optional): You can also include a message that will appear in the body of your emails for this task.
Email Message:

Next

Step 2 – Enter in the email address of the person or persons who want this escalation to go. You can also tag an escalation to go to the sender as well as any manager they report to (see check box options on this page).

Note: You can use this option to escalate ALL reports back to the sender as a conformation that the server received each transaction. When you get to Step 3, select nothing and just Save; that will email every transaction back to the sender (if that box here on step 2 is selected).

Step 3- all items of your form will be listed down the page on the left; a blue filter link will be on the right. To set the filter, select Set Filter next to the item in which you want to set a trigger.

Depending on what format your form item is in (multiple select, numeric, etc.), the filter system will present multiple options around that format to help you create a smart filter option. Save Filter and Finish.

Your new escalation will display now. You can Edit by selecting edit; Delete by selecting Delete.

Submit a form to the server and test the escalation function. When criteria is matched, the server sends a formatted PDF of the transaction to all in the email distribution list. Reports are typically sent and received within a few seconds of reaching the server.

Schedule Reports

Schedule reports sets up similar to Escalations; same type of form wizard. Please see the section on Escalations. This feature has (1) an added wizard page allowing you the schedule the criteria that matches and (2) sends all the matching criteria in an MS XLS format to the denoted addresses versus a PDF report.

Step 2 - Frequency

Select Report Frequency

☒ **Daily:** Send an email once a day with all the previous day's records.
☐ **Weekly:** Send an email once a week with all the previous week's records.
☐ **Monthly:** Send an email once a month with all the previous month's records.
(Data actually sent in each case is subject to filtering as defined in the "Filters" section.)

Time of Day to Send: Hour: 2 AM Minute: 0

Time Zone for Form: (GMT-08:00) US/Pacific

Select Call Reports Menu

Select Manage Call Reports

Select **Schedule Reports** next to the form in which you want to access data

Welcome	Call Reports	Administration	Help
	Manage Call Reports		
	Create New Call Report		
Language Test		Transaction Report	
Store Visit		Transaction Report	

Welcome						Call Reports	Administration	Help
Form		Options						
Language Test		Transaction Report	Escalation	Schedule Reports	Configure	Language Tools		
🛡️ Store Visit		Transaction Report	Escalation	Schedule Reports	Configure	Language Tools		

Use steps shown in Escalation to configure.

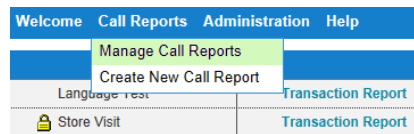
Configure

Configure is the section where you assign forms to users and manage some specific functions around the form.

Select Call Reports Menu

Select Manage Call Reports

Select **Configure** next to the form in which you want to access data



Welcome Call Reports Administration Help					
Form	Options				
Language Test	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools
Store Visit	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools

Form Users Tab

Under the Form Users tab, you can select which types of reps as well as what regions, etc. are to get the form. In most cases, forms are assigned to All Rolls; but you may selectively choose this to a more granular level.

You can also use the radio button to assign forms down to the individual level.

The screenshot shows the 'Form Users' tab with two radio buttons: 'Assign Users By Category' (selected) and 'Assign Users Individually'. Below the radio buttons, there is a 'Select Roles' section with a list of roles: All Roles (checked), Administrator, Read Only, SDR, DM, RD, and RVP. To the right of the roles list, there are four sections: 'Selected Roles: All Roles', 'Selected Areas: All Regions', 'Selected Regions: All Markets', and 'Selected Districts: All Districts'. At the bottom, there are three buttons: 'Select Areas', 'Select Regions', and 'Select Districts'.

This page will also display at the end of the creation of a new call report.

Forms Settings Tab

Form Title - You can edit the form title, keep a description (optional), denote a time zone, denote of the form as active or inactive.

Form Logo – You can upload a logo to display on reports for that form. For example, if you create a form for a specific retailer and want to share forms with them, you could use their logo as an option. For example, if a form is 100% related to Xbox, the Xbox logo could be uploaded to this form for reports.

The screenshot shows the 'Form Settings' tab with two main sections: 'Edit Form Title' and 'Form Logo'.
Edit Form Title: Includes fields for 'Form Title*' (containing 'IAE Visit'), 'Description: (optional)' (a text area), 'Time Zone:' (a dropdown menu set to '(GMT-08:00) US/Pacific'), and 'Active:' (a checked checkbox).
Form Logo: Contains instructions on uploading a logo, a placeholder image, and options: 'Keep Current Logo' (selected), 'Remove Logo', and 'Upload New Logo'. Below this is a section for 'Upload New Image' with supported formats (JPG, JPEG, PNG, GIF and BMP) and a 'Logo:' field with a 'Browse...' button.
Form Settings: At the bottom, there is a section for 'Include Store List:' with a checked checkbox, and a 'Selected Master Dealers:' field showing 'Indirect'. At the very bottom are 'Save', 'Reset', and 'Cancel' buttons.

Form Settings – You can denote a form to include OR NOT INCLUDE the store pick list. Not every form you create may be related to a store visit; this is the option to create a form not related to a specific store (outside event, school, mileage tracker, expense tracking, etc.).

If you are using Chains, this is where you can denote forms to support only users that visit that particular chain.

This screenshot shows a detailed view of the 'Form Settings' dialog, specifically the 'Chains' section. It features a list box titled 'Chains' with the following options and their selection status:
☐ All Master Dealers
☐ Global
☒ Indirect
☒ National Retail
☐ Retail
The 'Include Store List:' checkbox at the top of this section is also checked.

Select Save after editing any section.

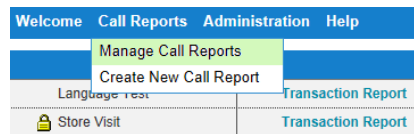
Language Tools

The system supports a way in which you can translate a form from one language to another.

Select Call Reports Menu

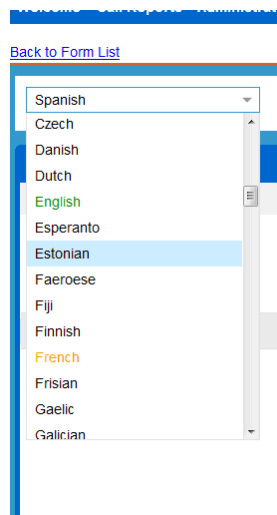
Select Manage Call Reports

Select **Language Tools** next to the form in which you want to access data



Welcome Call Reports Administration Help						
Form	Options					
Language Test	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools	
Store Visit	Transaction Report	Escalation	Schedule Reports	Configure	Language Tools	

The form that has been copied or create in your account is ready for translation. Enter Language Tools and select from the drop down of languages in which you wish to translate to.



Note on colors. In the language drop down list box, if a translation has not been started; the language will display in black. If a translation has been started but not completed, it will display in yellow (the system supports partially translate forms). If the language is displayed in green the entire form has been translated.

The example shown below shows Spanish to be the target language to translate the form to.

All visible text from the form will display for translation. Click directly on any line of this spreadsheet. The column on the far right called Target Language; this is editable. Click the row and enter in the translation from the original column to the Target Language column.

Select Update and then do these until all field rows have been translated.

[Back to Form List](#) Language Tools: *Language Test*

Spanish

Edit Form Language

Form Fields	Original	Target Language
Form Title	Language Test	Prueba de Lenguaje
Page 1 Title	Information	Información
Yes/No field	Do you speak English?	¿Hablas Inglés?
List field	Number	Número
Default Value	Two	Dos
List Item 1	One	Uno
List Item 2	Two	Dos
List Item 3	Three	Tres

Update Cancel

Once completed, the handset when connecting to your online account will pass its default language in which that handset is configured to the server; which will then tell the server to pass the translated call report to the handset.

DASHBOARD

A dashboard that will display store visit compliance and other statistics will be online by August 1st, 2013. This document will be updated to include this section here.

Welcome

Dashboard

Reports

Store Management

AirMobility

Administration

Help

My Account

Sign Out

Compliance

Delivery Method

RS Non-Training Stats

Training Stats

Store Visits Stats

Visit Time

Month: Dec 2010

To: Dec 2010

Master Dealer: All

Remember Settings: ☐

Clear Settings

Area: All

Region: All

District: All

Rep: All

Get Results

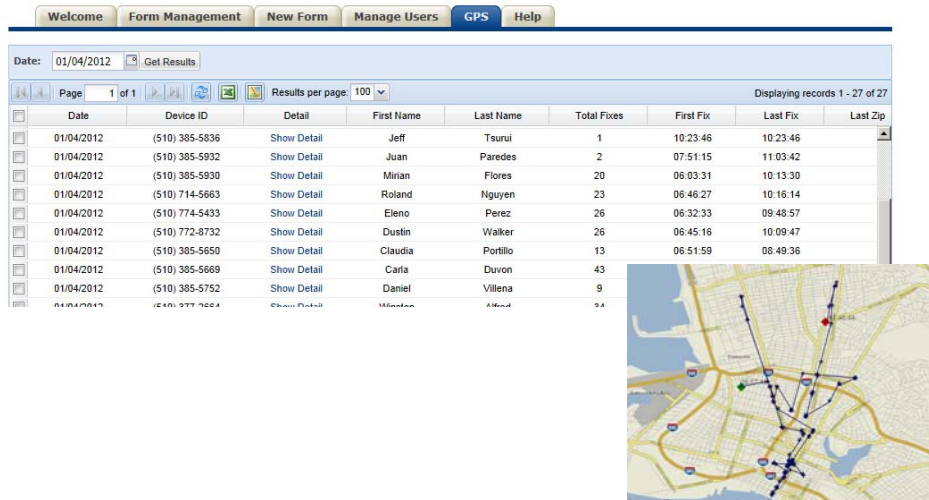
Page 1 of 1

Displaying 1 - 2

Area	Region	Visits Required	Visits Completed	Visits Expected as of Today	Visit Progress (Completed / Expected)
Area: Central (5 Regions)					
Central	Totals	2258	1724	2258	1724/2258 (76%)
Central	Chicago	522	456	522	456/522 (87%)
Central	Great Plains	424	298	424	298/424 (70%)
Central	Michigan/Indiana	457	374	457	374/457 (82%)
Central	Minnesota/Wisconsin	352	213	352	213/352 (61%)
Central	Ohio/Kentucky	503	383	503	383/503 (76%)
Area: Northeast (6 Regions)					
Northeast	Totals	2118	1410	2118	1410/2118 (67%)
Northeast	Greater Philadelphia and Tri-State	470	340	470	340/470 (72%)
Northeast	Mid-Atlantic	348	222	348	222/348 (64%)
Northeast	New England	586	426	586	426/586 (73%)
Northeast	New York City	335	123	335	123/335 (37%)
Northeast	New York Metro	350	275	350	275/350 (79%)
Northeast	Puerto Rico	29	24	29	24/29 (83%)
Area: South (6 Regions)					

GPS/LOCATION BASED SERVICES

GPS tracking for bread crumb trails, etc. will be available online by August 1st, 2013. The application is live with GPS tracking now and coordinates are being submitted. You can use some of this when exporting to a PDF through the transaction reports under call reports.



SETTINGS

The system supports a few setting options for the Administrator.

Edit Account Info – We suggest you do not change any of this as the defaults will largely support our standard reporting tools, etc.

Company Logo – Defaulted to Microsoft's main logo but you can upload and change this to something else.

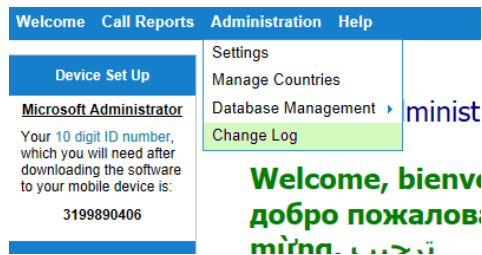
Welcome Message – This will be the message that will display when users in your country sign in. We rate the online tool we are using here as average, not great. Expect some spacing issues, etc. and always test/review the main page to ensure this is the way you want it.

Select Save after making any edits to this page in the lower right part of this page.

CHANGE LOG

The change log is a way for the Administrator to keep general track of basic transactions happening on the server. Who logged in and when, what did they do, etc.

Select Administration Menu Select Change Log



Select a **date range** and select **Get Results**.

From:	07/01/2013	To:	07/01/2013	Page Name:	All	Get Results
Change Log						
Page 1 of 1						
Timestamp	Page Name	Command	Changed By	Log Detail		
Mon July 1, 2013,...	Login Page		Admin	User Login: Admin ()		
Mon July 1, 2013,...	Login Page		Admin	User Login: Admin ()		
Mon July 1, 2013,...	Login Page		Paul Contreras	User Login: Paul Contreras (paul.contreras@.com)		
Mon July 1, 2013,...	Login Page		Ana Contreras	User Login: Ana Contreras (ana.contreras@.com)		
Mon July 1, 2013,...	Self Change L...	update	Kevin Dawson	Updated Login Info : Kevin Dawson password : updated by user update_required : true -> false		
Mon July 1, 2013,...	Login Page		Yanira Santos	User Login: Yanira Santos (yanira.santos@.com)		
Mon July 1, 2013,...	Login Page		Jennifer Redfern	User Login: Jennifer Redfern (jennifer.redfern@.com)		
Mon July 1, 2013,...	Login Page		Allen Casey	User Login: Allen Casey (allen.casey@.com)		
Mon July 1, 2013,...	Login Page		Josh Mallory	User Login: Josh Mallory (joshua.mallory@.com)		
Mon July 1, 2013,...	Login Page		Jake Purcell	User Login: Jake Purcell (jake.purcell@.com)		
Mon July 1, 2013,...	Login Page		Mack Bari	User Login: Mack Bari (mack.bari@.com)		
Mon July 1, 2013,...	Login Page		Brent Darling	User Login: Brent Darling (brent.darling@.com)		
Mon July 1, 2013,...	Login Page		T.C. Woodberry	User Login: T.C. Woodberry (tc.woodberry@.com)		
Mon July 1, 2013,...	Login Page		Alex Crow	User Login: Alex Crow (alex.crow@.com)		

Note – items are blacked out from this being from a different customer; no data yet in the MSFTREPS.COM system at the time of this document being made.

HELP

Our help section is a depository for support documents, training materials, videos (as we create them) and more.

Welcome Call Reports Administration Help	
Documents	
Application Installation Instructions	
AIRmobility Retail Module Basic Architecture	
Support Videos	
How to Create a Form Using AIRmobility	Click Here
Live Help Guide	
Installation, Set Up and Support	

CONTACT INFORMATION/SUPPORT

www.msftreps.com was created and is supported by Westlake Software, Inc. We are located in Los Angeles, CA.

Main support email – help@westlakesoftware.com

Main phone (USA) – (818) 991-9988

Microsoft corporate contact for this project is Brian Pannick (brianpan@microsoft.com).

If you are just getting started and you need assistance, we would like to schedule a time to work with you that is convenient for both; please email alan.gould@westlakesoftware.com to set up a time.

Once you are fully up and running, our support will be available to you 24 X 7 X 365.

Thank you

Westlake Software, Inc.

TROUBLE SHOOTING COMMON ISSUES

The two most common initial set up support calls we receive are:

- I do not know my PIN number
- My forms do not show up

These are related.

The first step of any rep is to log in online to retrieve their 10 digit ID number. Noted on the welcome screen on the left; all users 10 digit ID numbers are displayed on their home page.

If you wish to look it up for them, enter User Management, their 10 digit ID number will be next to their name in the User list.

When reps claim their forms are not showing up. For example, you create a form called Store Visit which everyone has it but one user, one of two things are going on:

- This user was not assigned the form (highly unlikely but it could happen if you were assigning a form individually versus denoted to All Users).
- Most likely and most common is that the user accidentally entered in their ID number incorrectly. To edit the ID number on the handset:
 1. Swipe left or right when the forms page is displayed to show the settings page.
 2. Review the ID number under the ID label. If no ID is shown then no ID has been set.
 3. Tap on the ID field.
 4. Tap in the ID text box to enter or change the ID number.
 5. Enter or update the ID number.
 6. Tap the check mark in at the bottom of the screen.
 7. Forms are updated automatically at this time...
 8. Swipe left or right to get back to the forms page from the settings page.