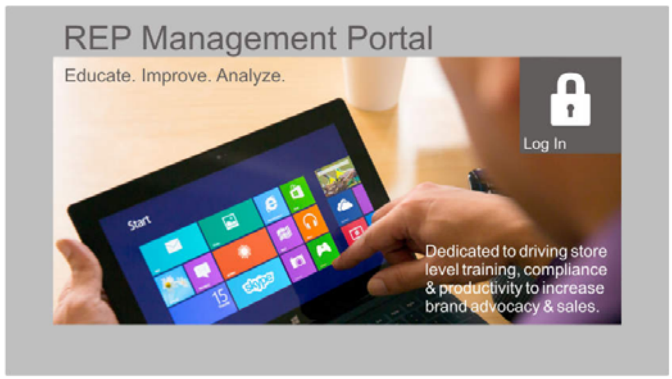
Westlake SOFTWARE, Inc.

Wireless Business Solutions



WWW.MSFTREPS.COM ADMINISTRATION GUIDE FOR

Microsoft

Version 1.1

July 2nd 2013

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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

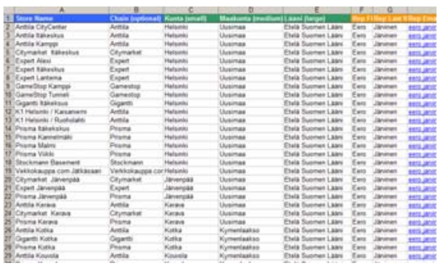
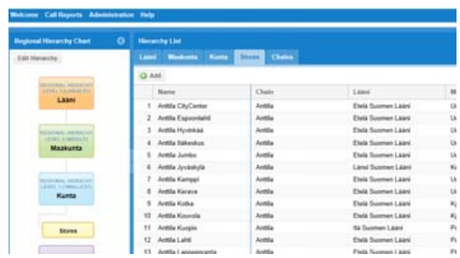
Westlake Software, Inc.

GETTING STARTED – ROLL UP FILE

Step 1 is to submit your initial roll up file which will include the names of your staff, stores they are assigned to and more. This has been provided in an .XLS format and can be obtained from:

1. Brian Pannick - brianpan@microsoft.com
2. If you already have access online, the roll up file XLS will be in the online help section.

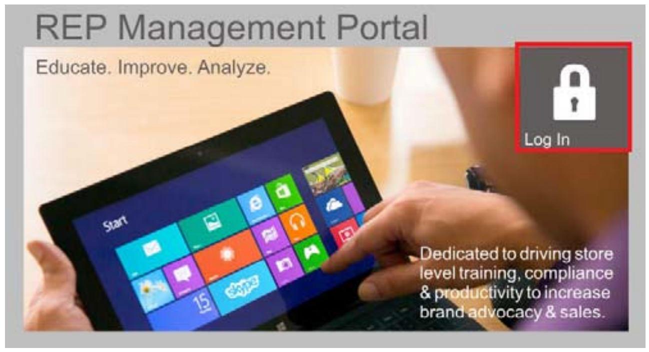
This roll up file is a one-time submission that will help get your account initially populated. Once imported, you will have the ability to add, edit and delete any of this data now populated in the online database.

Completed Roll-Up File…	…Converts to Online Database
	

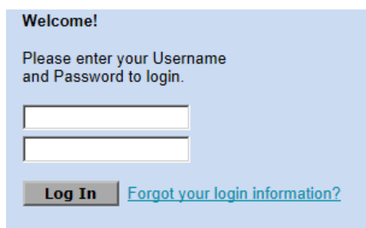
LOGIN – ADMIN

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.

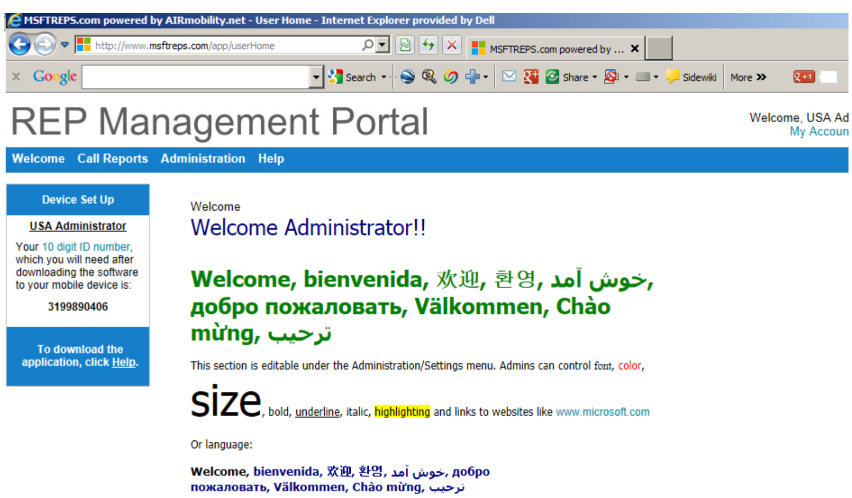
1. Go to: www.msftreps.com
2. Click the **Log In** Box:



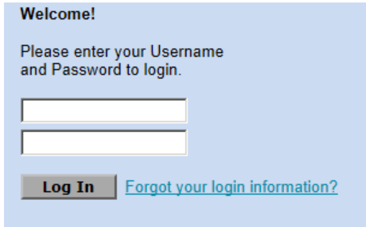
3. **Enter** in the **Username** and **Password** provided to you and select the **Log In** Button:



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.



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.

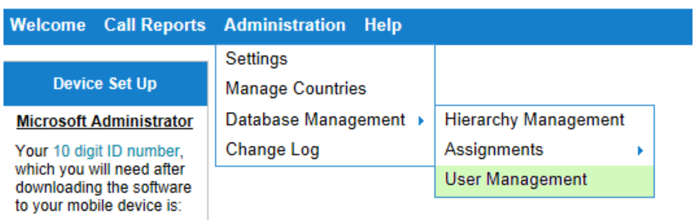
Text on the Main Welcome Page – is editable for your country and by you as the Administrator. See section in this document called Settings.

USER MANAGEMENT

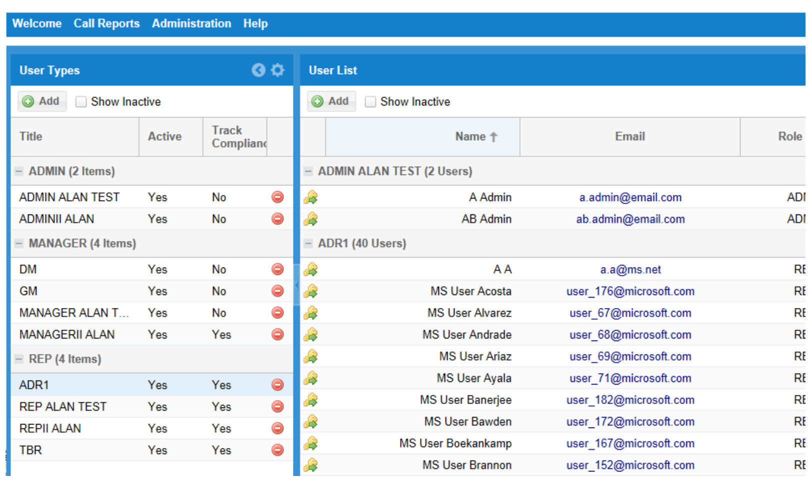
We currently offer 3 tiers of users:

Administrators	Full control over forms, data access, database access, store visit frequency, job schedules, etc.
Managers	Ability to make store visits, can view all data collected by Representatives assigned to them.
Representatives	Ability to make store visits, can view all data collected they have submitted (but only their data), can control online calendar to populate store visit dates.

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



This will take you to the User Management controls as shown here (sample data displayed).



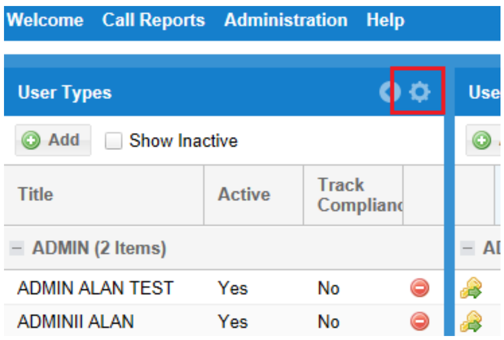
If you have provided us with a roll up file, names, titles, etc. will have already been pre-populated. This document will cover how to Add, Edit and Delete Titles as well as Users from the online system.

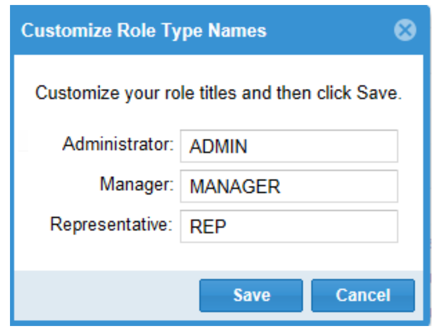
Title Controls

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



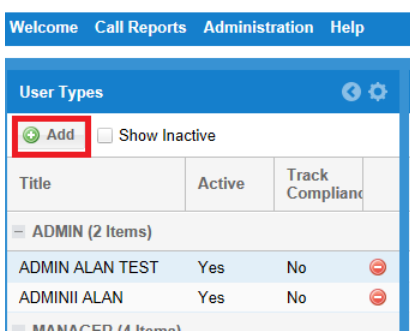


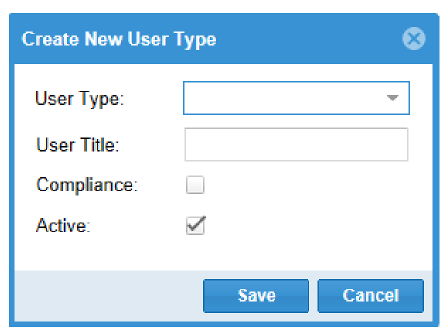
The idea here is that if in your country it is more appropriate to call an Administrator a Director or a Representative an Executive for example; you can change this to more accurately describe your rolls.

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





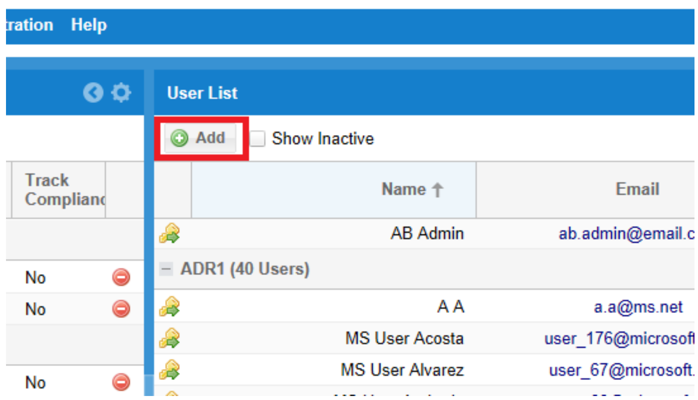
“User Type” is a drop down menu of the 3 tiers (Admin, Manager, Rep). User Title is what you are <u>now adding</u> as a title to support any one of those 3 tiers. If you want to track store visit compliance on this particular rep type, check the compliance box. If this is a title you use intermittently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

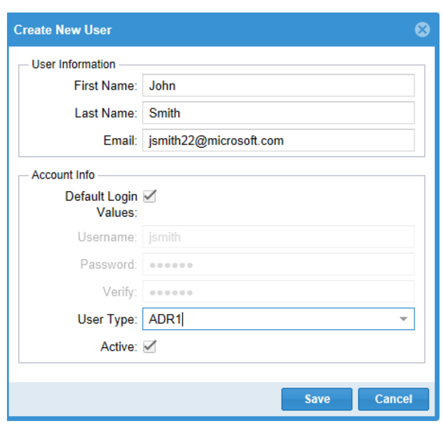
Adding a New User

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



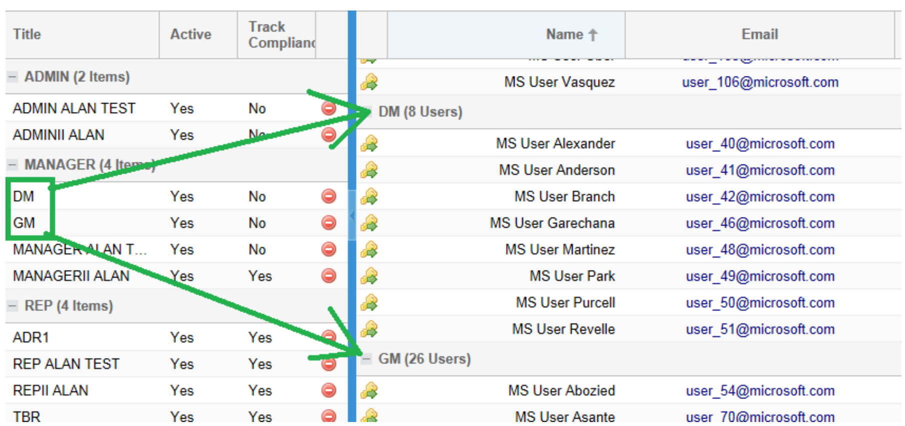
For the Account Information, we have two options to get a new user set up.

1. You can use our default user name and password option. If for example you name is John Smith, you 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:



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*
- AIRmobiltiy Version (AIRmobility is our client software name)*
- Last Transaction Date*

- Registration Date
- Option to Delete the User

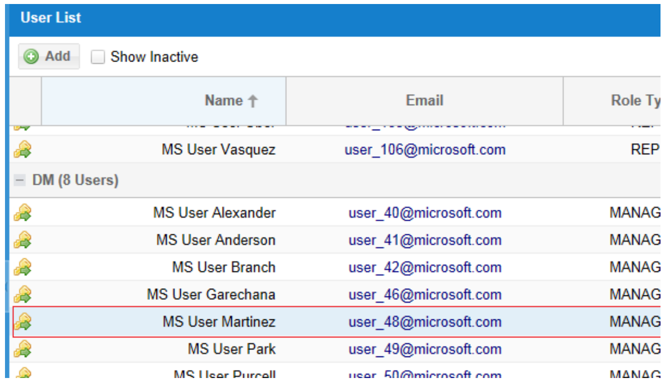
* This data will populate from the handset once the user has submitted their first record to the server.

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.

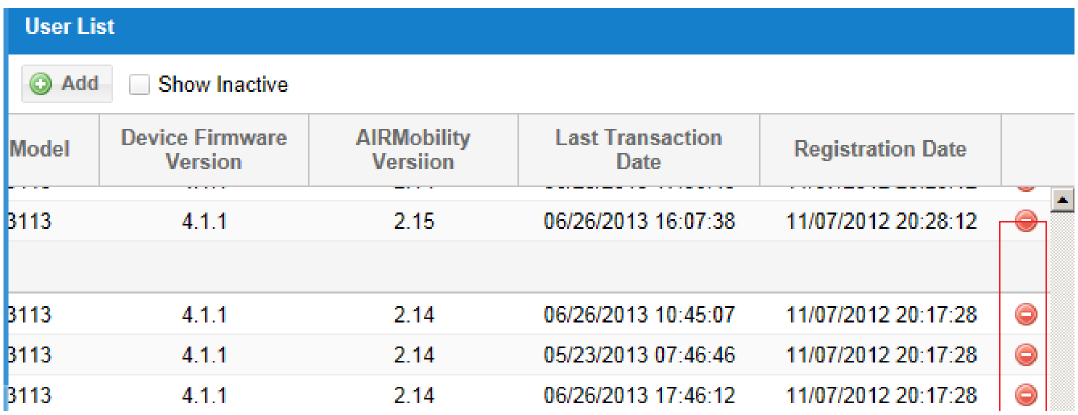
Edit an Existing User

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



Delete an Existing User

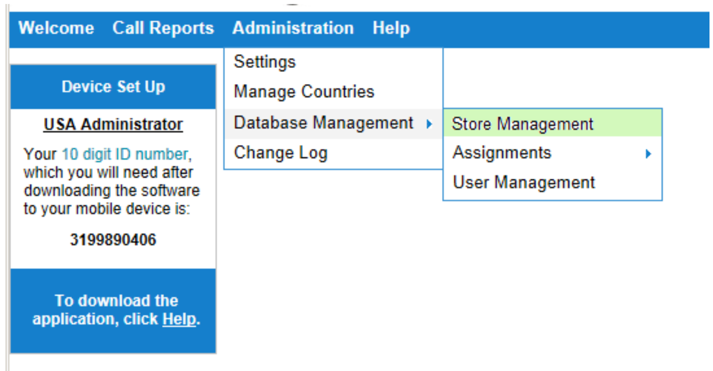
Scroll the User List all the way to the right and select the red delete icon.



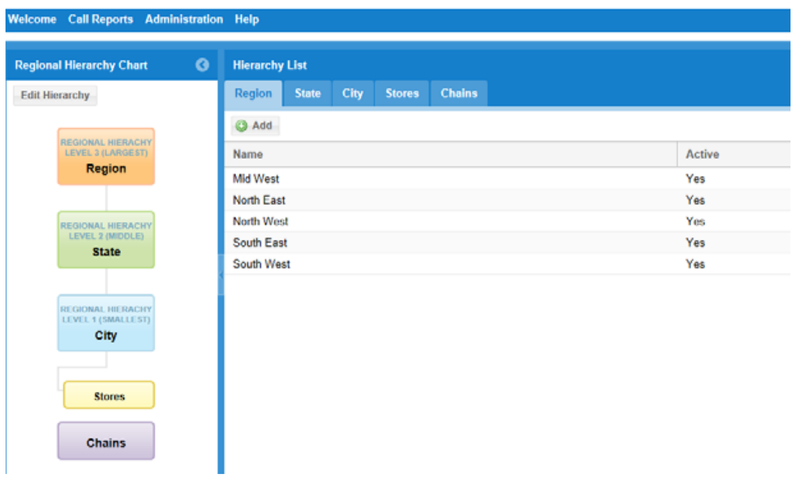
Note: Deleting a user will not delete their historical store visits in the system.

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.



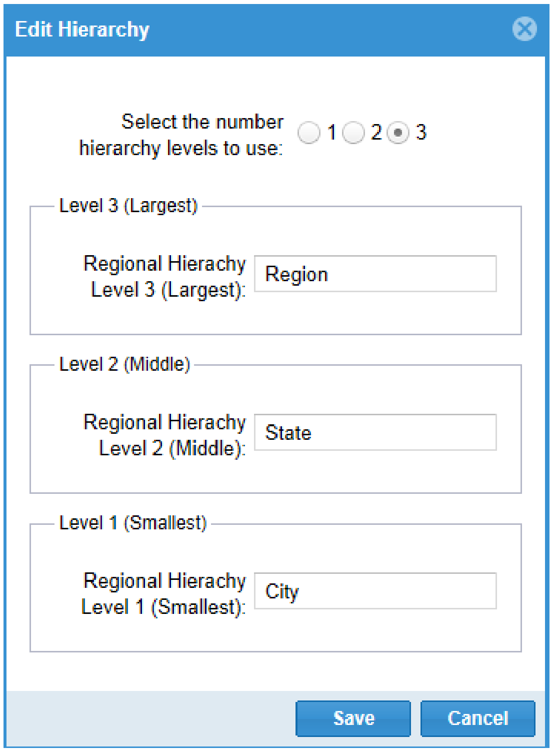
Store Regional Hierarchy

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

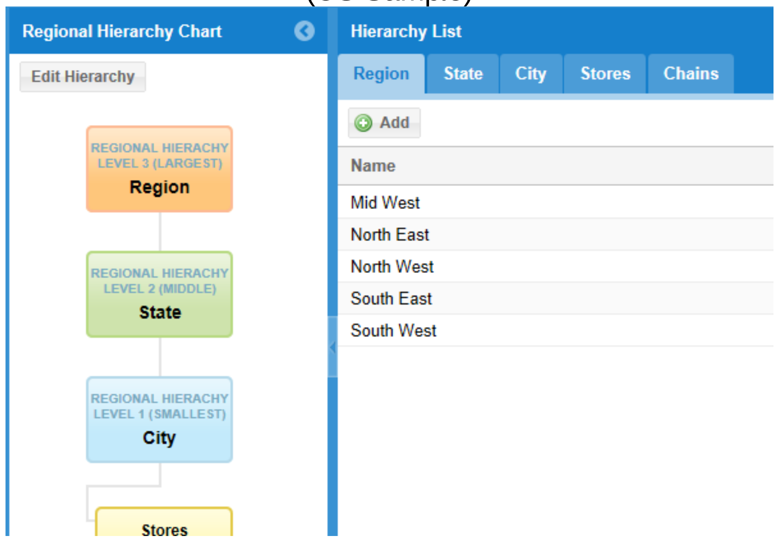
You can use a single tier or up to three tiers to define the location in which a store is located. Select the Edit Hierarchy button.

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.

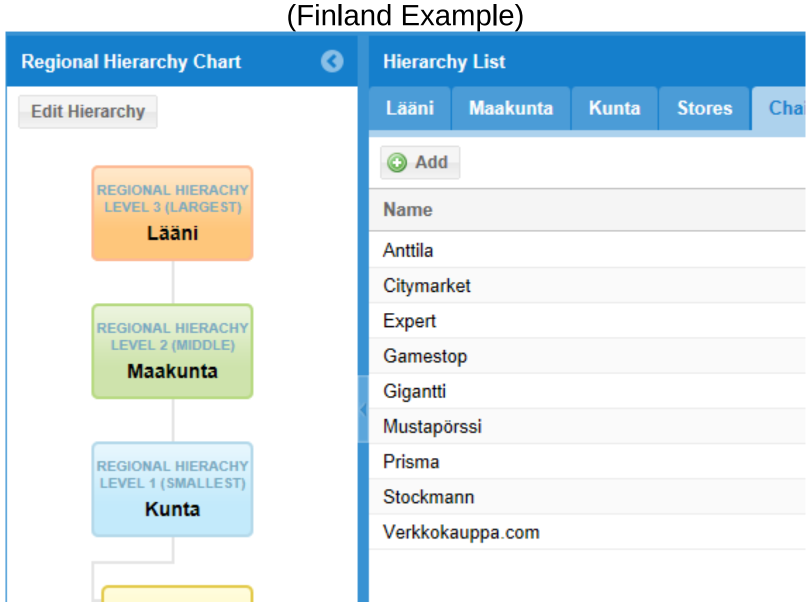


By Saving your changes, this will change the titles on the color graphics on the left as well as change the titles of the tabs on the right.

(US Sample)



(Finland Example)

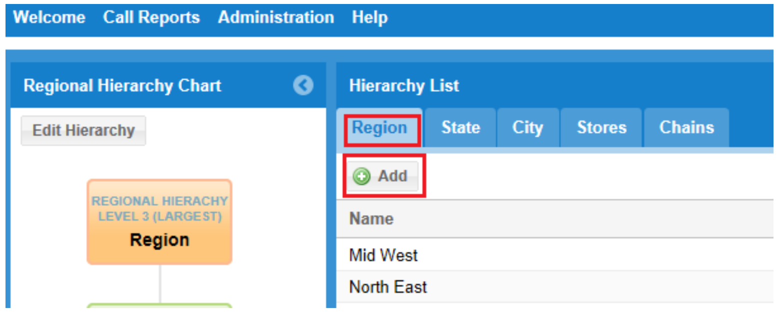


For this document, we will be referencing tabs as labeled by the United States example. Your titles/regions if you change them will be different. However, the functions to add, edit and delete will be the same.

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**

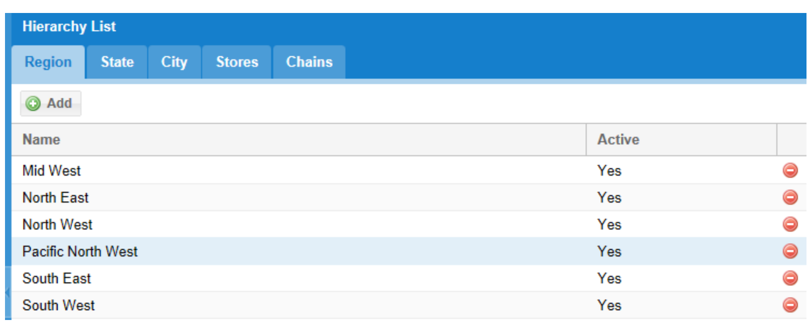


Add the name of a Region and select **Save**.

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

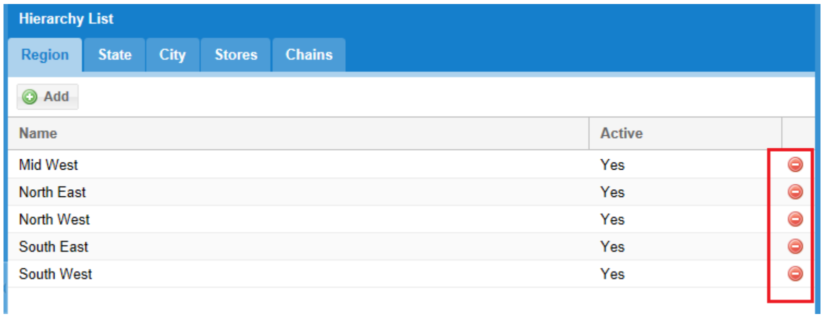
Edit a Level 3 Region (largest)

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



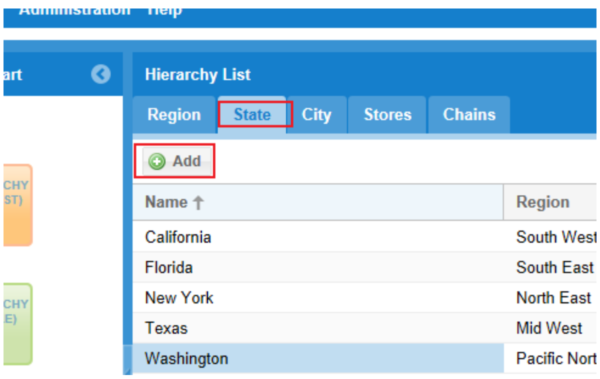
Delete a Level 3 Region (largest)

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

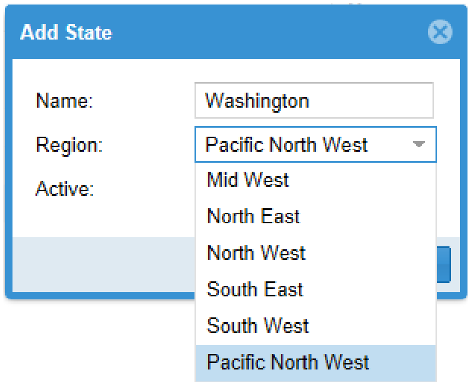


Add a Level 2 Region (middle)

Select the **State Tab**
Select the **Add Button**



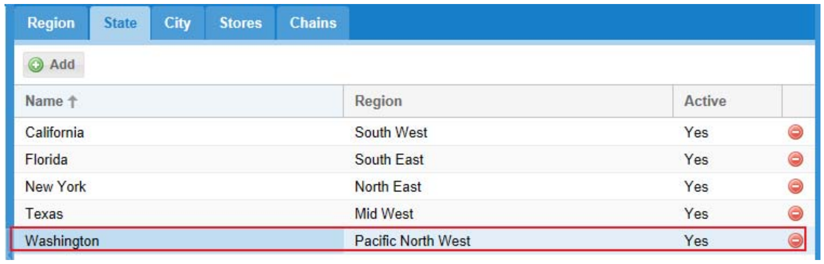
Add the Name of the State, associate the state with a Region and select Save.



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

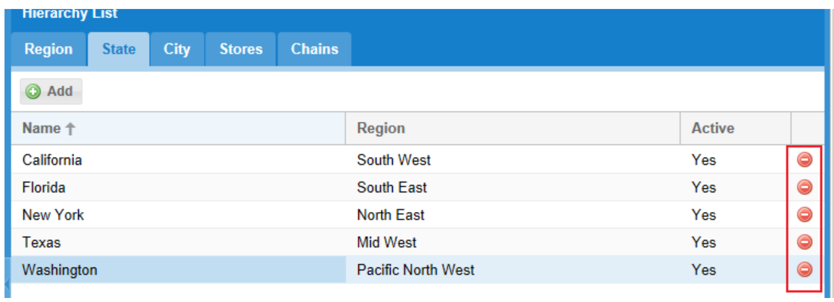
Edit a Level 2 Region (middle)

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



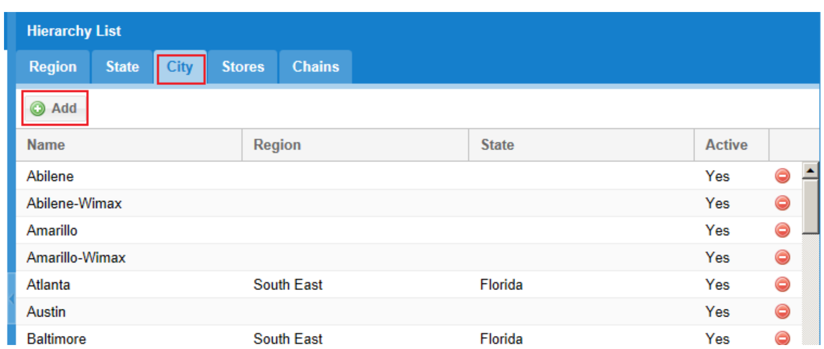
Delete a Level 2 Region (middle)

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

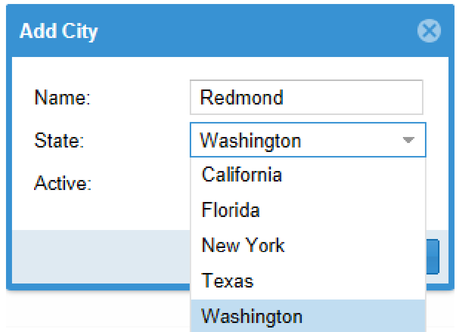


Add a Level 1 Region (smallest)

Select the **City Tab**
Select the **Add Button**



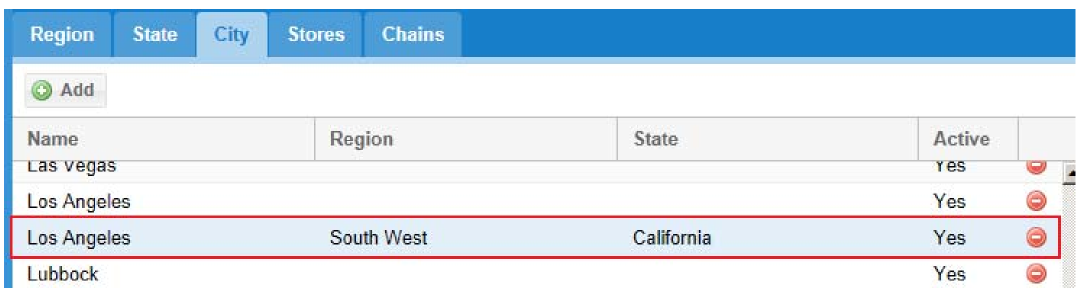
Add the Name of the City and then associate this with a State in the drop down menu.



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

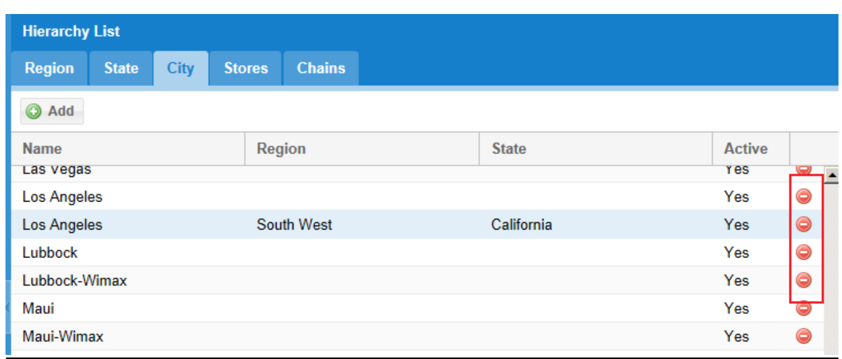
Edit a Level 1 Region (smallest)

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



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.



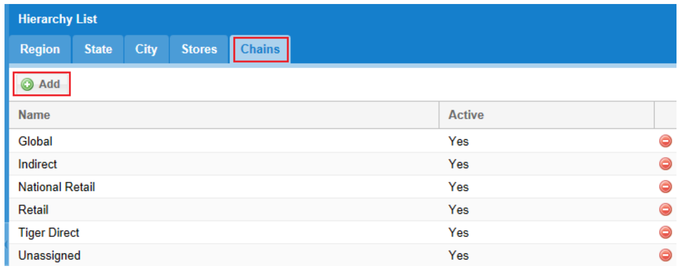
Chains

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.

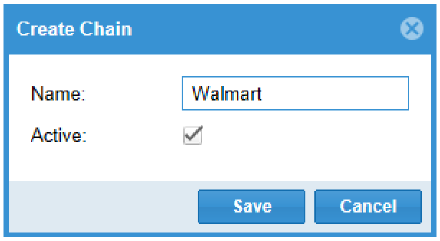
This is not a required option, but once you get into call report creation in the system, we have a way of associating call reports specifically to denoted chains if desired. The idea would be that an Administrator might want to create a form specifically for users that visits Walmart stores and only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

<u>Add a Chain</u>

Select the **Chain Tab**
Select the **Add Button**



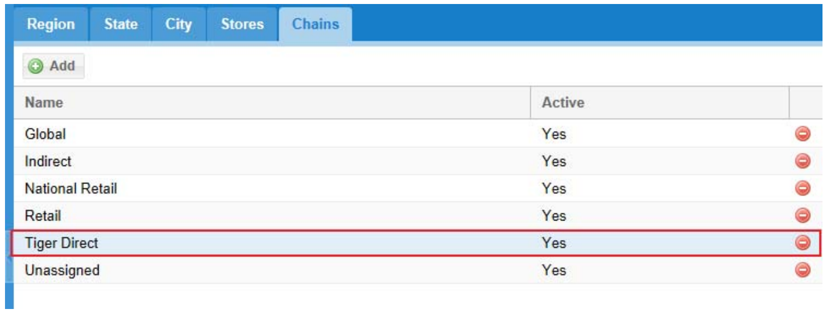
Add the name of a Chain and select **Save**.



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

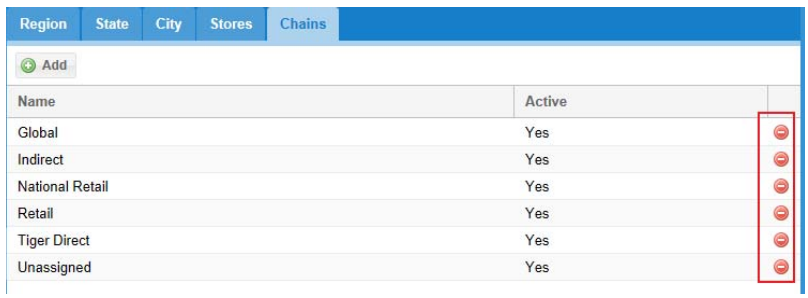
Edit a Chain

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



Delete a Chain

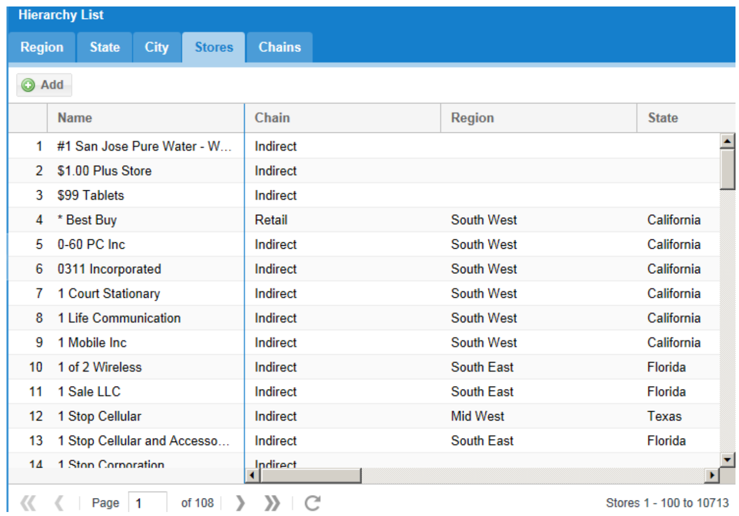
To delete a Chain, select the delete icon on the right; next to the state in which you wish to delete.



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.

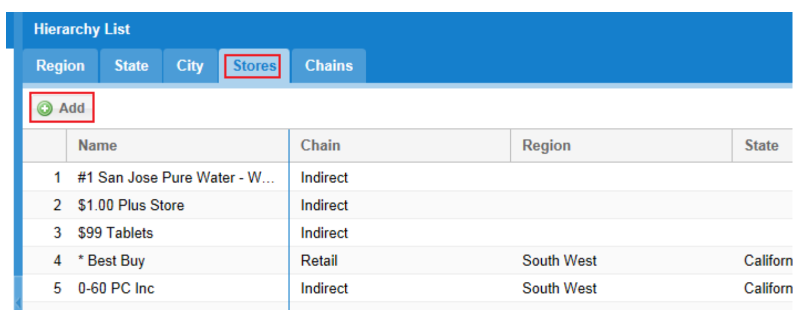
We display 100 stores at a time and then paginate the remaining stores. All columns can be sorted; a search feature will be added in Q4 2013. Most of your stores will have been pre-populated in the initial roll up file provided. However, we provide the ability to add, edit and delete stores from the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



	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 Stop Corporation	Indirect		

Add a New Store

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



	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

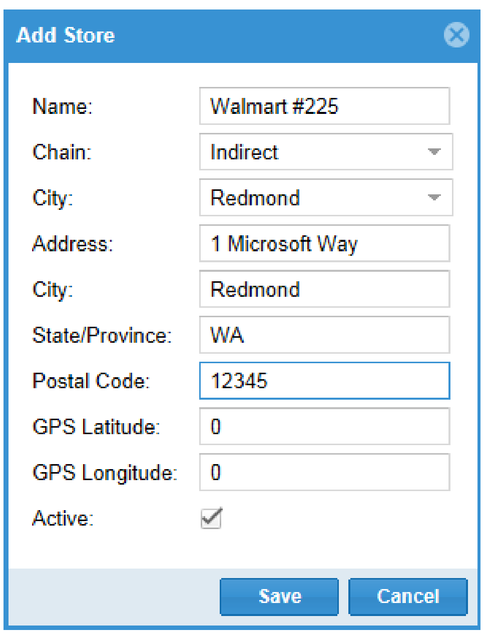
1. Enter in the Name of the Store (see graphic on next page)
2. Select a Chain the store is associated with (this is optional to denote a chain; using the chain function is also optional – see Chains in this document.
3. Select the tier drop down association (denoted here as City – this of course could 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 – Northbook.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.

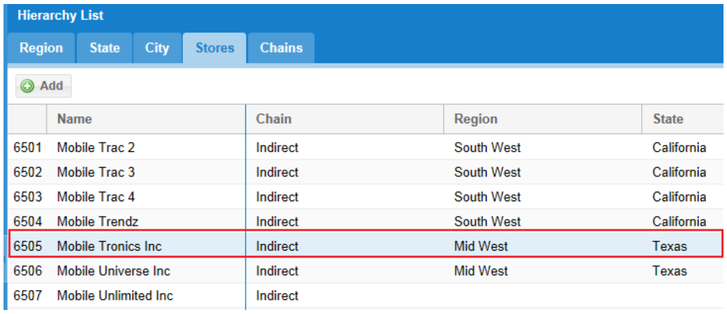
Whatever you decide to use as your naming convention, we do suggest that it is consistent across all stores.

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

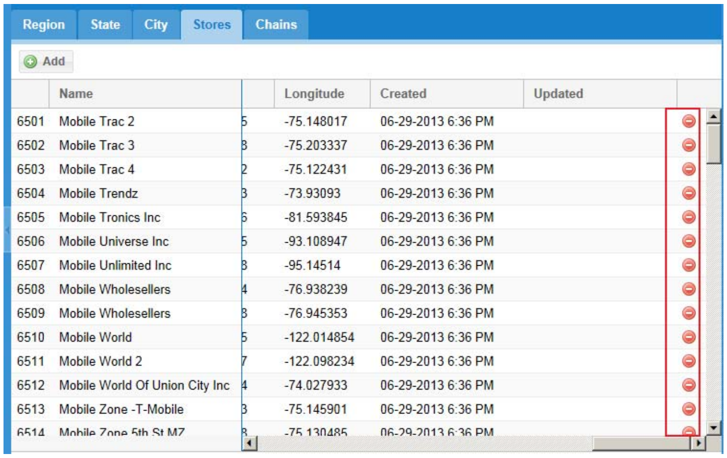
Region | State | City | Stores | Chains

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 form the list.



Region | State | City | Stores | Chains

Add

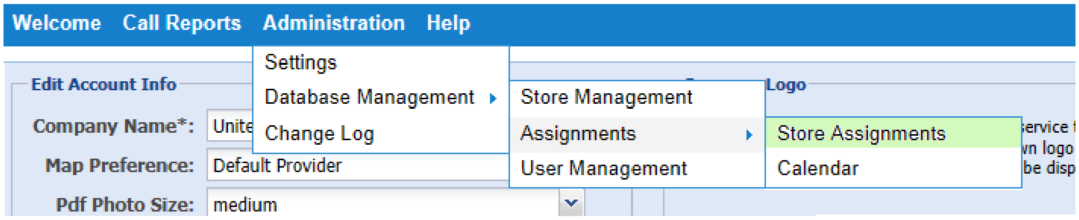
	Name		Longitude	Created	Updated
6501	Mobile Trac 2	5	-75.148017	06-29-2013 6:36 PM	
6502	Mobile Trac 3	3	-75.203337	06-29-2013 6:36 PM	
6503	Mobile Trac 4	2	-75.122431	06-29-2013 6:36 PM	
6504	Mobile Trendz	3	-73.93093	06-29-2013 6:36 PM	
6505	Mobile Tronics Inc	5	-81.593845	06-29-2013 6:36 PM	
6506	Mobile Universe Inc	5	-93.108947	06-29-2013 6:36 PM	
6507	Mobile Unlimited Inc	3	-95.14514	06-29-2013 6:36 PM	
6508	Mobile Wholesellers	4	-76.938239	06-29-2013 6:36 PM	
6509	Mobile Wholesellers	3	-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 MZ	3	-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.

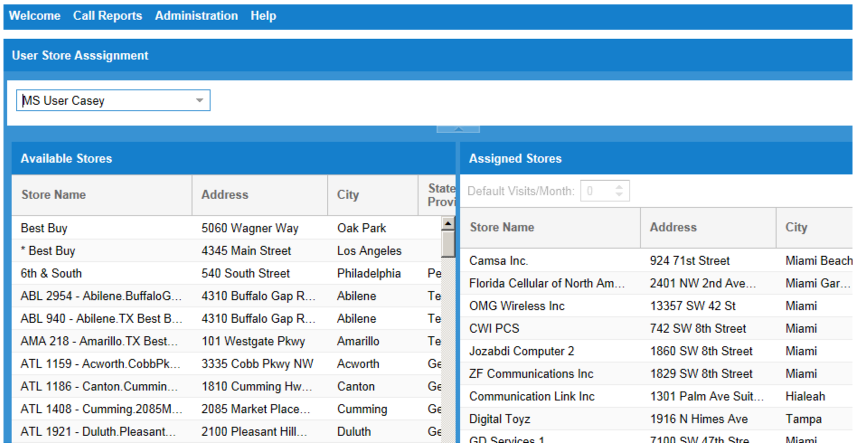
- Stores can be assigned to more than one user
- Administrators can set the frequency in which they want each user to visit that store in a calendar month
- All store visits can be placed on an online calendar – calendar will drive the store list handset side (all stores can be accessed at any time on 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

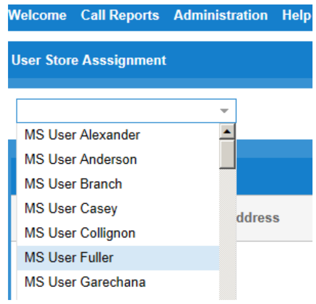


How this works

- 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.

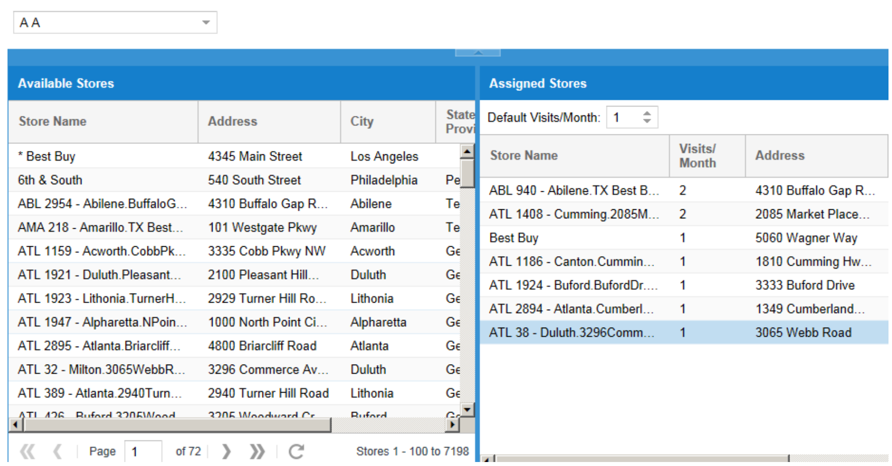


Start by selecting a User from the Drop Down menu:

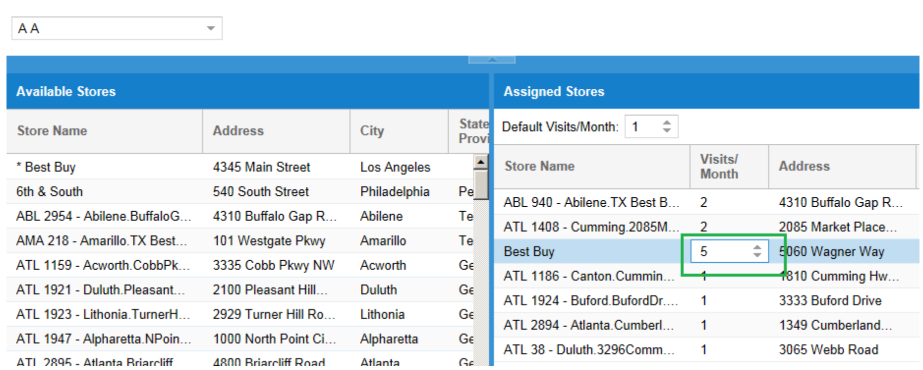


Stores that have been added to the system are listed on the left; stores that are assigned to the user are listed on the right.

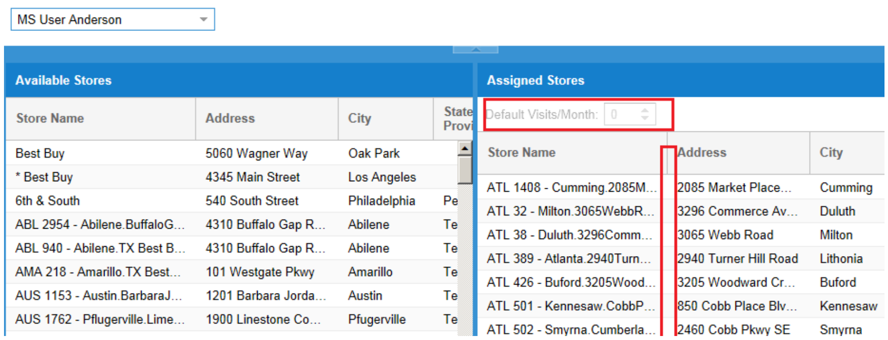
This is a drag and drop function. Drag stores from the left to right list to add them to the list of stores this user is to visit. Drag stores right to left to remove a store in which is not assigned to the rep.



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



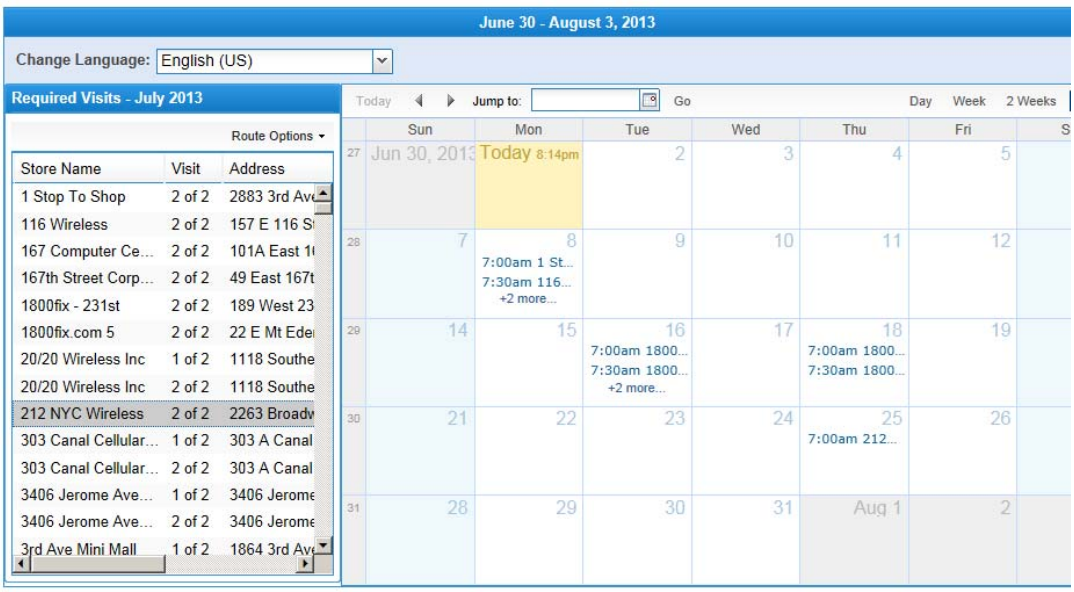
Note: *If you see that the Default Visits/Month is dithered and the Visits/Month Column is not visible, compliance for this user is turned off. Go to the User Mangement section, edit that user and turn compliance on.*



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



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.).

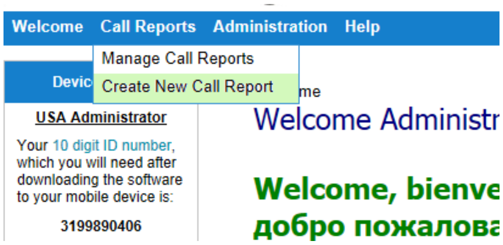
Stores that are deleted from the calendar are placed back on the left side column.

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

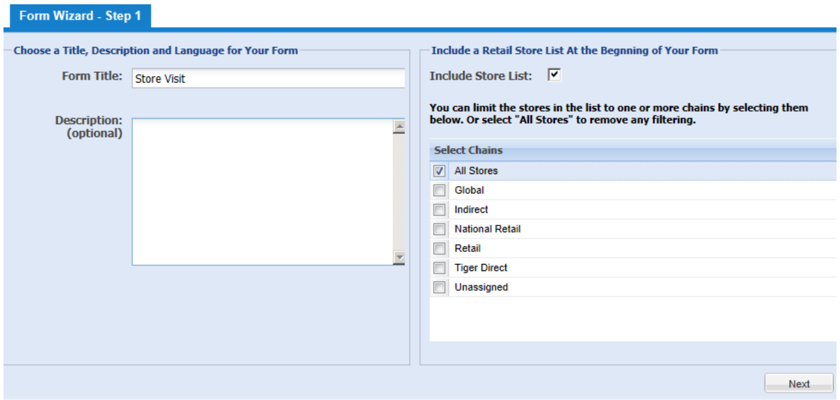
CREATE A CALL REPORT

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.



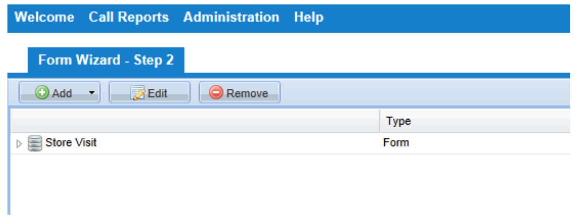
- In the Form Title box, name your new form/call report.
- There is a box to display a description but this is option and seldom used.
- You can opt to add your store list to a form or not have a store list present (some forms may not be tied to a store: expense reports, mileage, outside events at concerts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

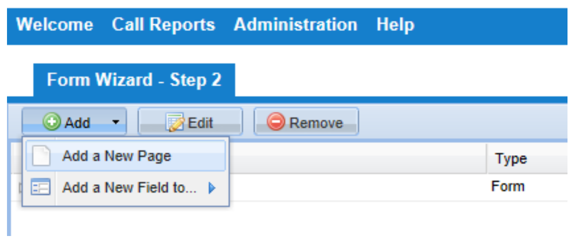
Add, Edit, Delete a Form/Call Report Page

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

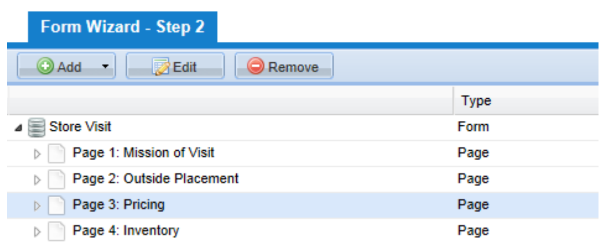


This interface enables you (1) create pages that can swipe left and right on the Window Phone 8 handset and (2) add items to each of the pages to fill out your call report from end to end.

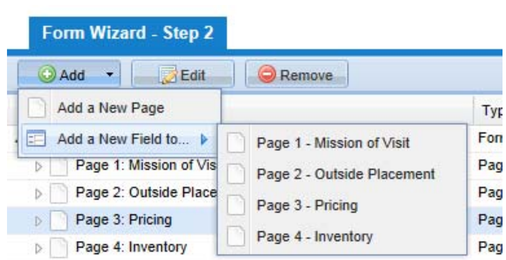
To create a new page for the phone, select the Add button. This will trigger a menu to Add a new page (label them as Training, Displays, Manager Notes, etc.).



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:

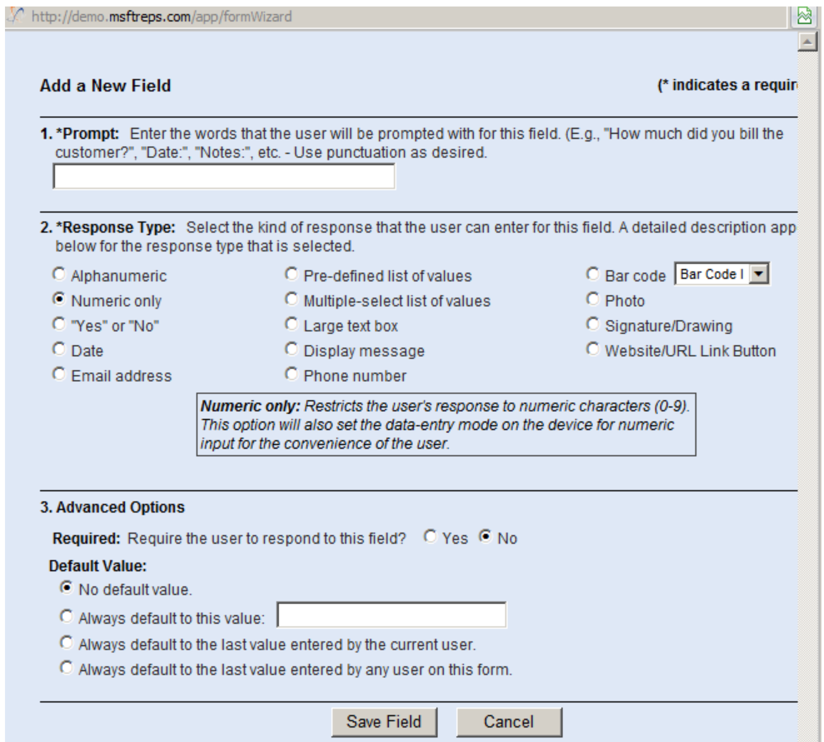


This will trigger the interface below in which enables you to highly format a new field item entry for that page.

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.



http://demo.msftreps.com/app/formWizard

Add a New Field (* indicates a requir

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 app below for the response type that is selected.

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 (Bar Code I) / 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.

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?)

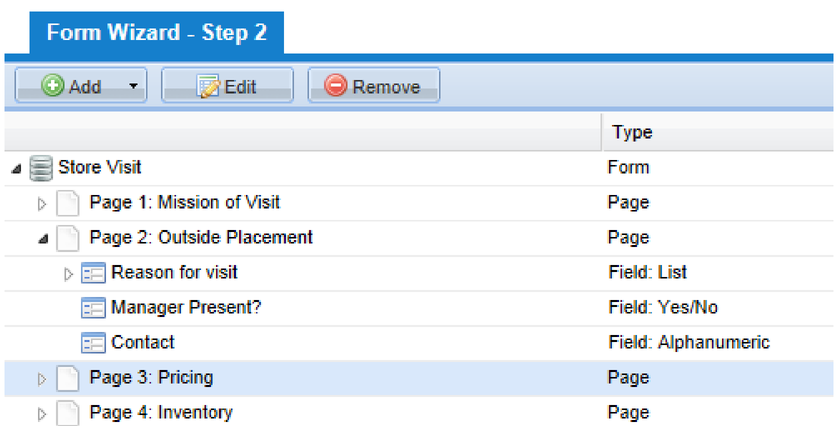
2. Response Type – this enables you to format the response type by the question being asked in the prompt. For example, of the prompt asked how many, you might use the numeric field. If how many is always 5.10. 15 or 20, I might use the Pre-defined list of values to allow the user to select from a list.

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.

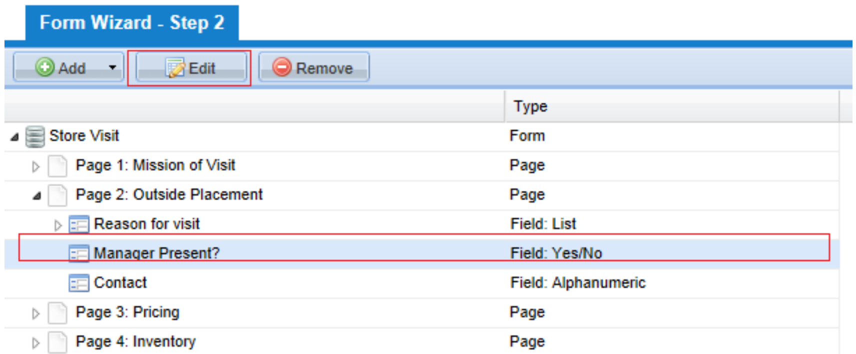
- **Alphanumeric** – This is an open ended field that support both alpha and numeric characters.

- **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.

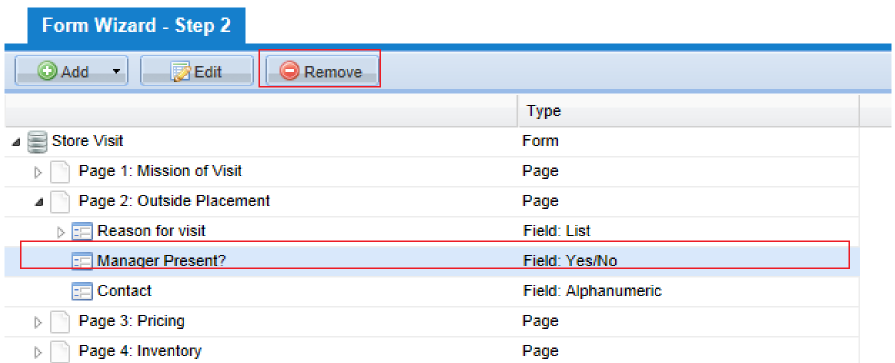
Once you have selected and completed an item, select Save. This will take you back to the call report/form hierarchy and now display your new item under the carrot of the page in which you denoted:



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



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

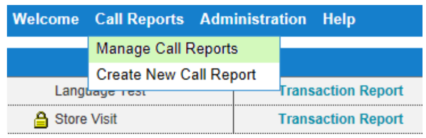


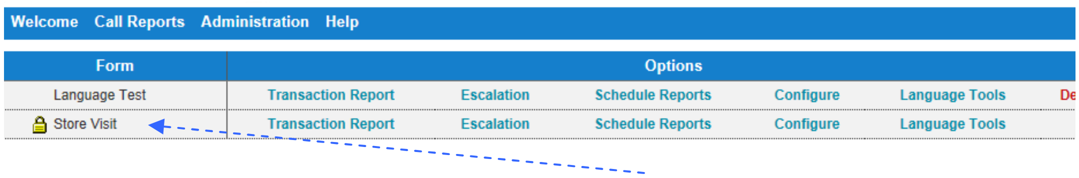
This is the bases of the form/call report feature. More documentation will be added in the next version of this document.

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



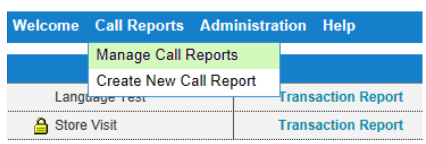


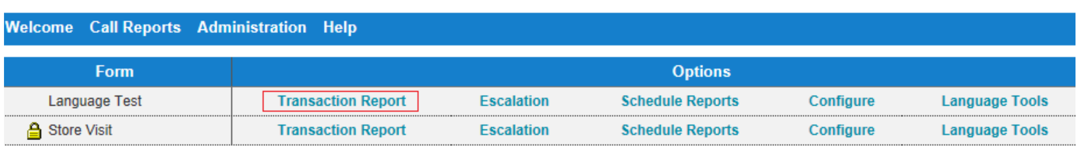
Each call report is listed down the left side of the page. The tools and controls for each form are noted next to it to the right.

Transaction Report

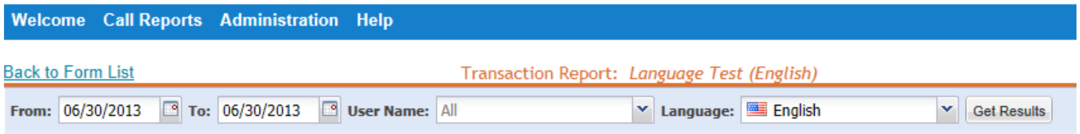
Transaction Reports are your “online spreadsheets” to view collected data and to export data.

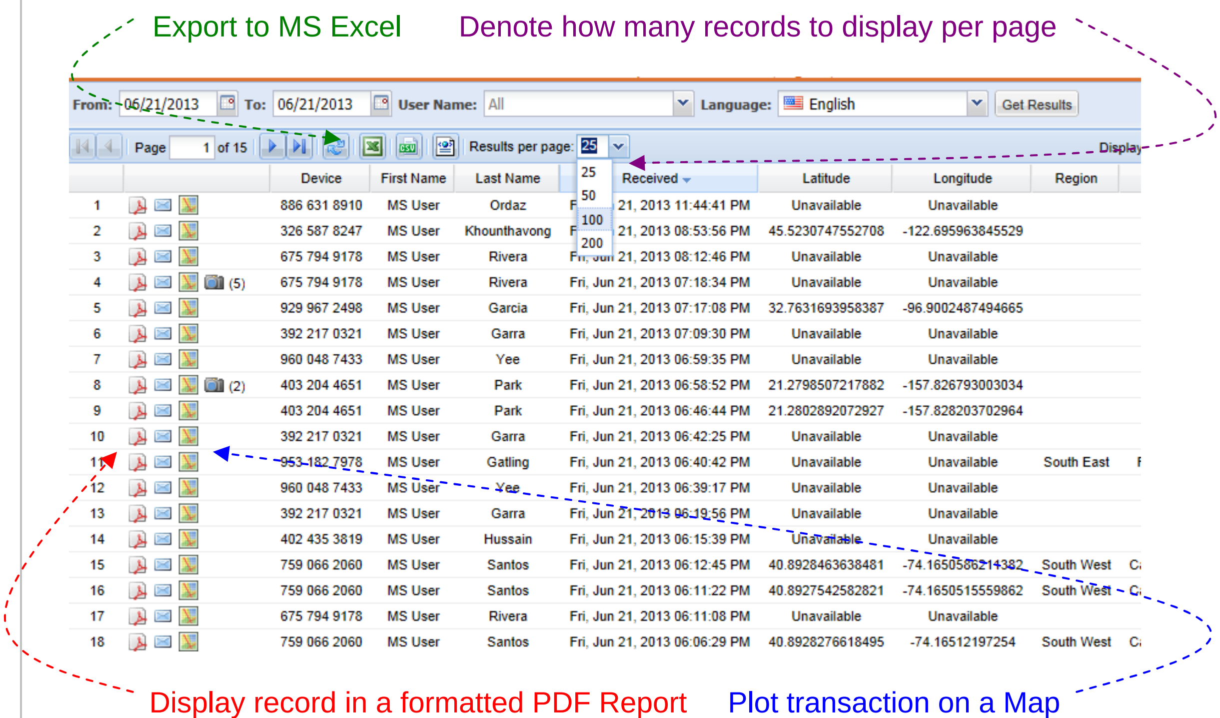
Select Call Reports Menu
Select Manage Call Reports
Select Transaction Report next to the form in which you want to access data





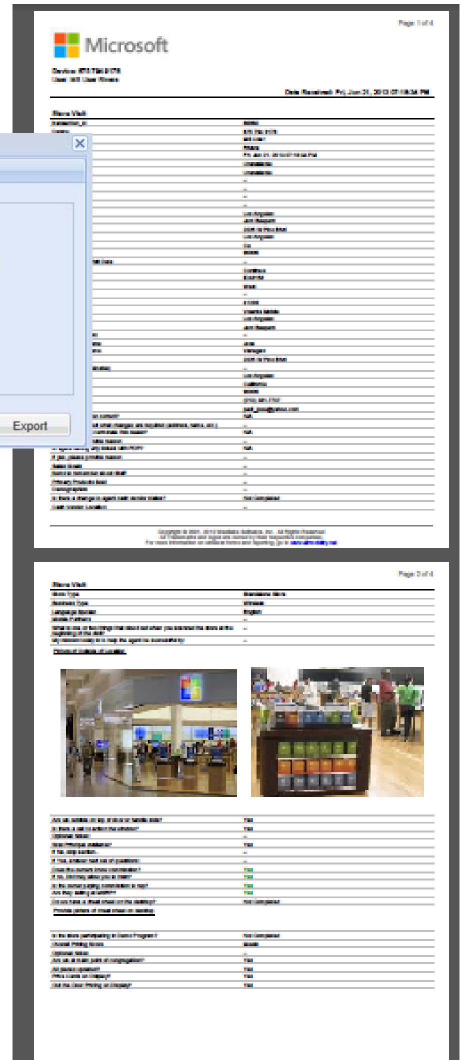
Select the **date range** in which you want to view data, narrow your view by rep or by default, display all, and **select** the **Get Results** button.

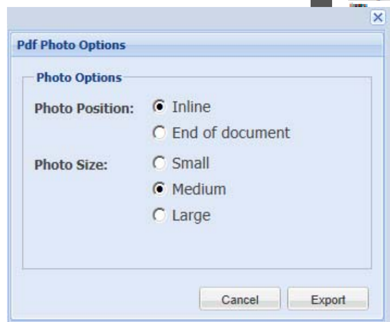




Note: the entire call report is listed across the page as the this page will scroll to whatever length necessary to show all data.

Export Controls

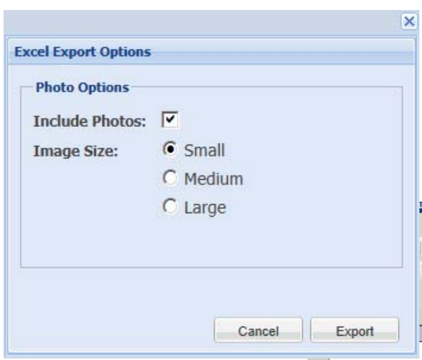


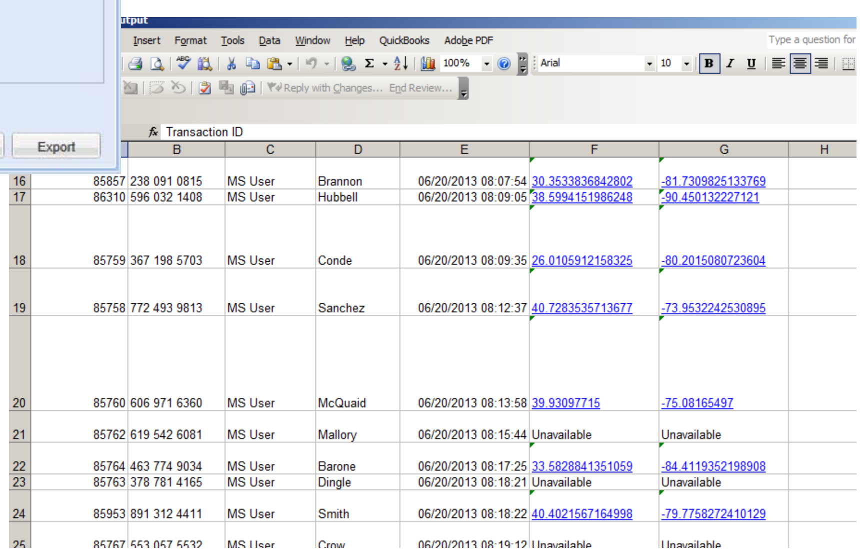


Call Reports exported to a PDF Report
And as an XLS File.

PDF reports have some formatting options.

XLS export can support information with or
Without photos.

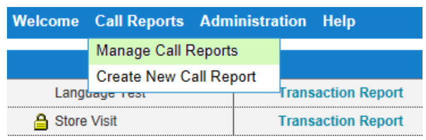




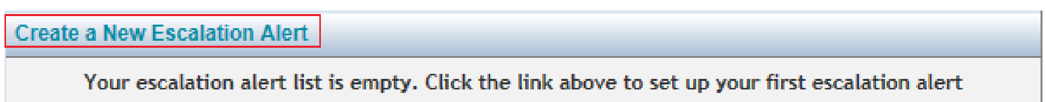
Escalation

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.

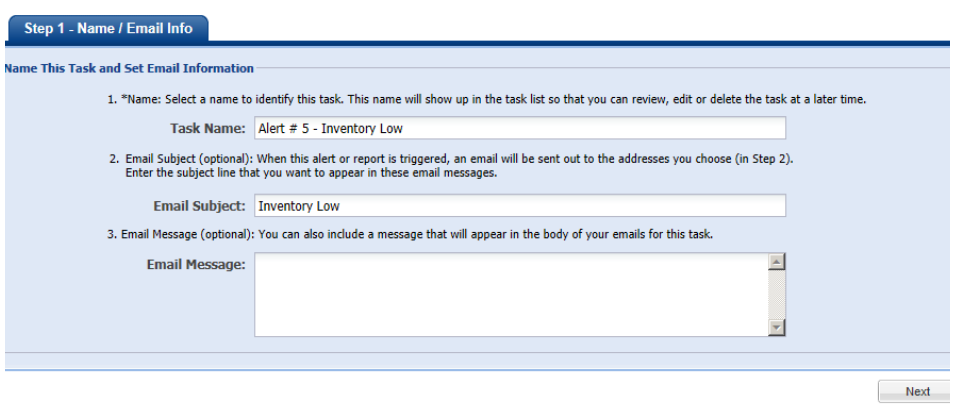
Select Call Reports Menu
Select Manage Call Reports
Select Escalation next to the form in which you want to access data



Click on Create a New Escalation Alert:

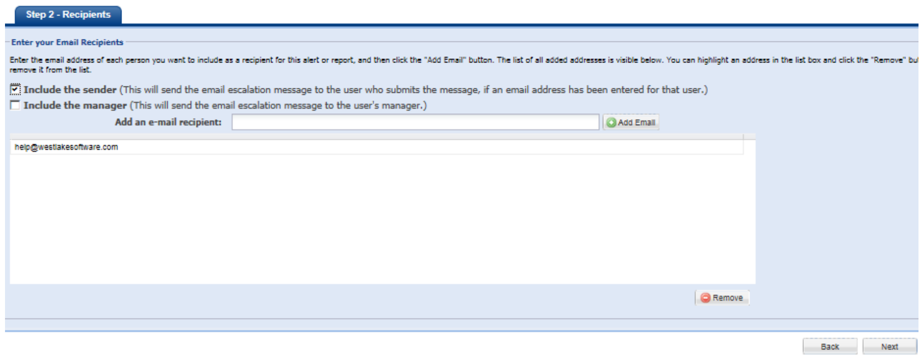


Step 1 – Name the Escalation for reference. If you are created an escalation to denote low inventory from an inventory question, you might call this “Inventory Low Alert.” It is common for the Task name and the Email subject line (what the alert will say on the email subject line when sent to you) to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

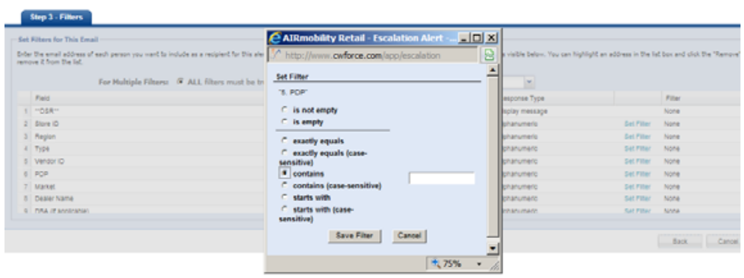


Step 2 – Enter in the email address of the person or persons who want this escalation to go. You can also tag an escalation to go to the sender as well as any manager they report to (see check box options on this page).

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).

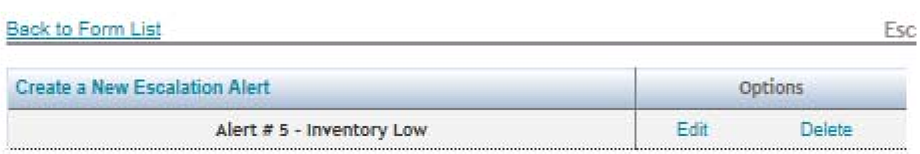


Step 3- all items of your form will be listed down the page on the left; a blue filter link will be on the right. To set the filter, select Set Filter next to the item in which you want to set a trigger.



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.

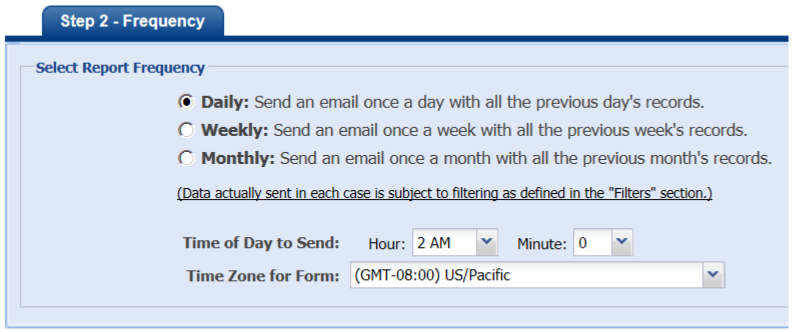
Your new escalation will display now. You can Edit by selecting edit; Delete by selecting Delete.



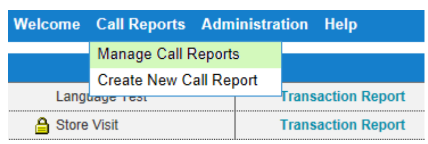
Submit a form to the server and test the escalation function. When criteria is matched, the server sends a formatted PDF of the transaction to all in the email distribution list. Reports are typically sent and received within a few seconds of reaching the server.

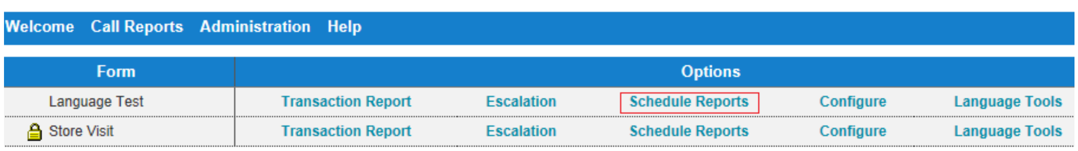
Schedule Reports

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 critera in an MS XLS format to the denoted addresses versus a PDF report.



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



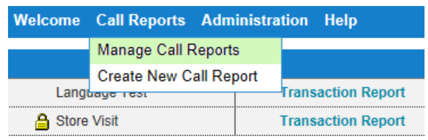


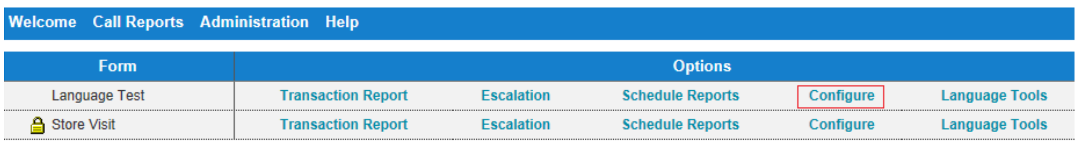
Use steps shown in Escalation to configure.

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

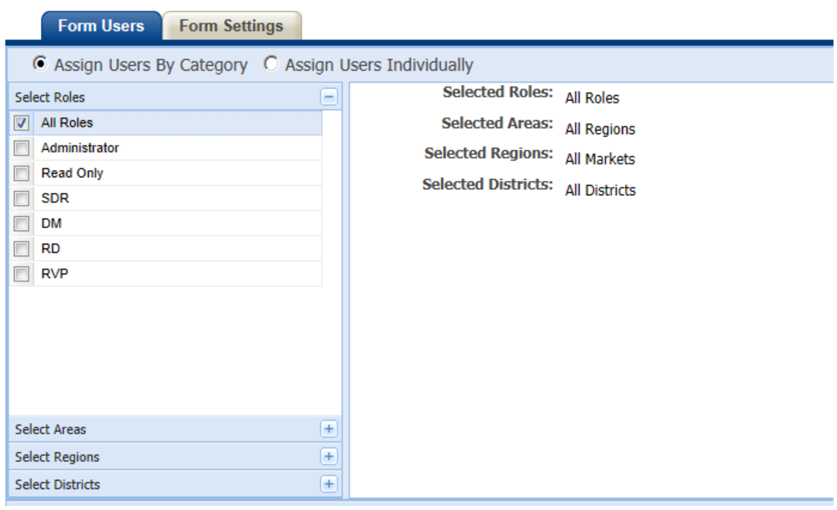




<u>Form Users Tab</u>

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.

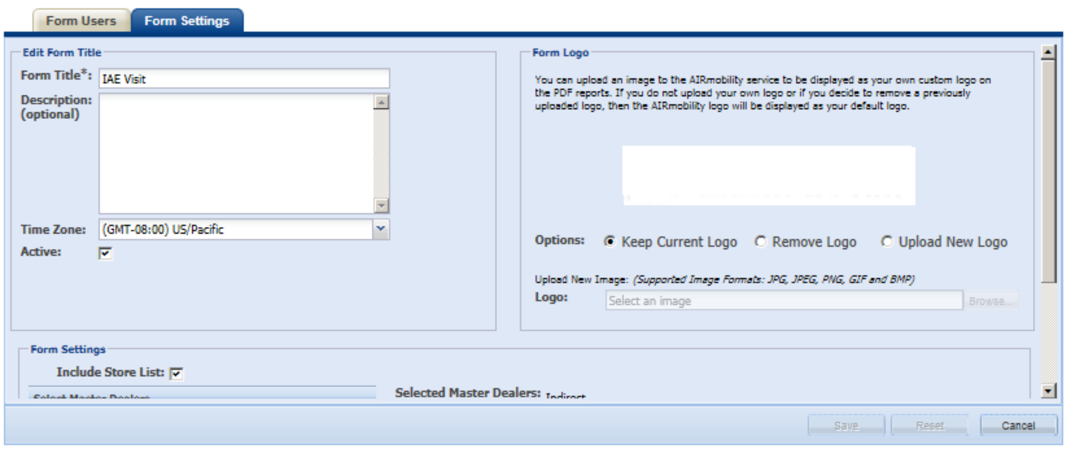


This page will also display at the end of the creation of a new call report.

Forms Settings Tab

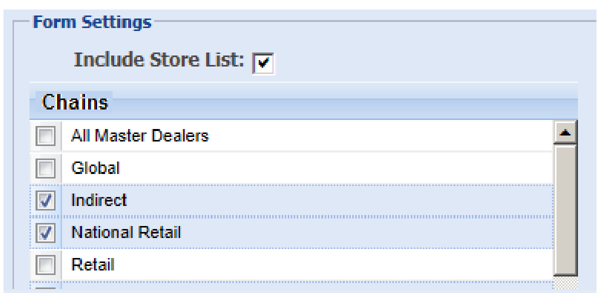
Form Title - You can edit the form title, keep a description (optional), denote a time zone, denote of the form as active or inactive.

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.



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.

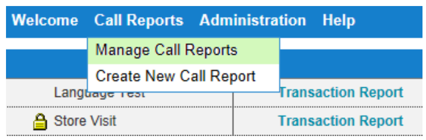


Select Save after editing any section.

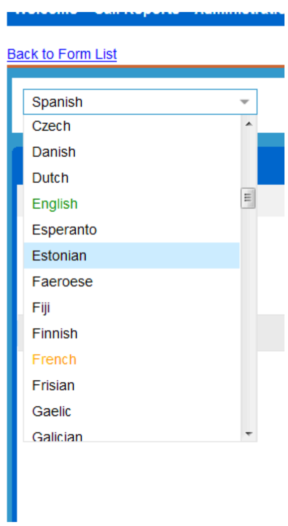
Language Tools

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



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.

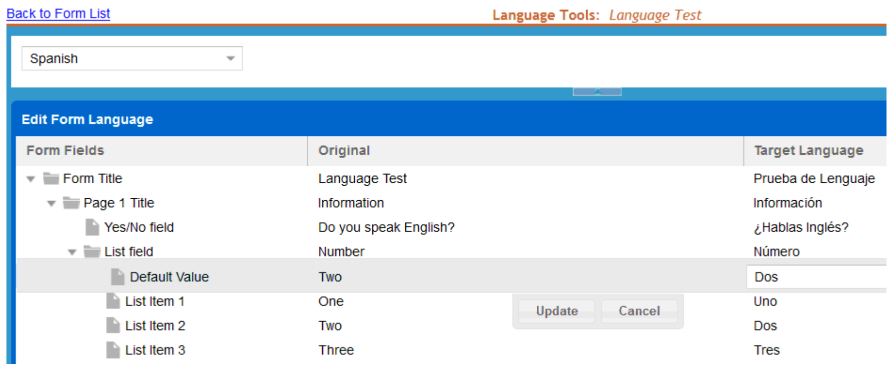


Note on colors. *In the language drop down list box, if a translation has not been started; the language will display in black. If a translation has been started but not completed, it will display in yellow (the system supports partially translate forms). If the language is displayed in green the entire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

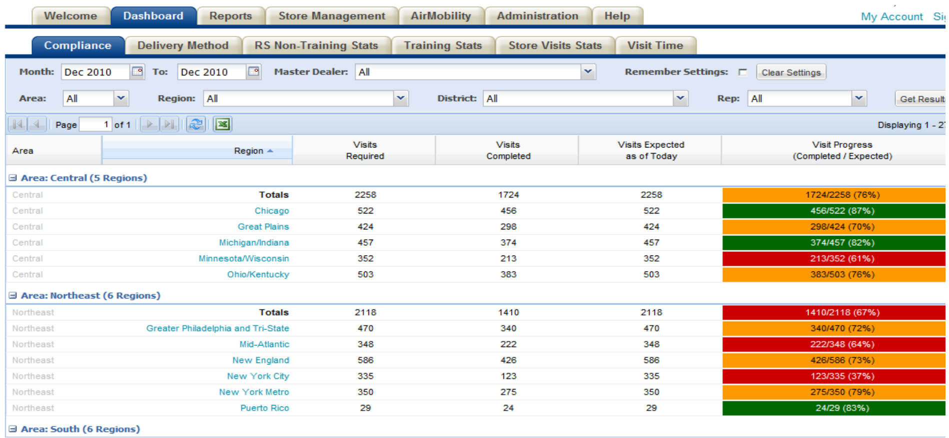
Select Update and then do these until all field rows have been translated.



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

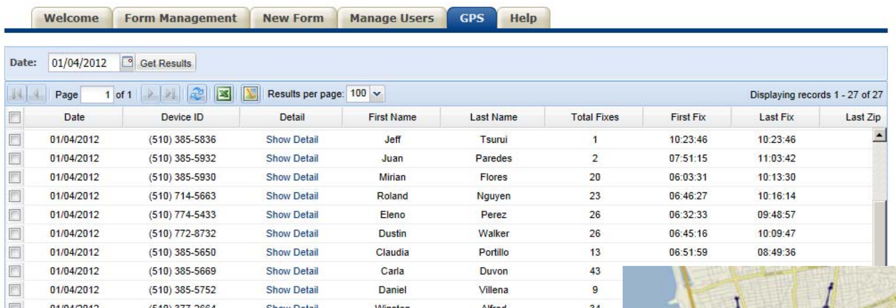
A dashboard that will display store visit compliance and other statistics will be online by August 1st, 2013. This document will be updated to include this section here.



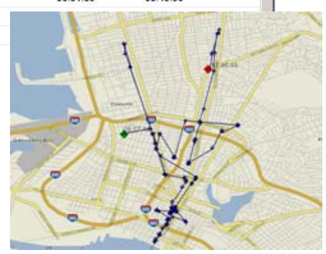
Area	Region	Visits Required	Visits Completed	Visits Expected as of Today	Visit Progress (Completed / Expected)
Area: Central (5 Regions)					
Central	Totals	2258	1724	2258	1724/2258 (76%)
Central	Chicago	522	456	522	456/522 (87%)
Central	Great Plains	424	298	424	298/424 (70%)
Central	Michigan/Indiana	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.



Date	Device ID	Detail	First Name	Last Name	Total Fixes	First Fix	Last Fix	Last Zip
01/04/2012	(510) 385-5836	Show Detail	Jeff	Tsurui	1	10:23:46	10:23:46	
01/04/2012	(510) 385-5932	Show Detail	Juan	Paredes	2	07:51:15	11:03:42	
01/04/2012	(510) 385-5930	Show Detail	Mirian	Flores	20	06:03:31	10:13:30	
01/04/2012	(510) 714-5663	Show Detail	Roland	Nguyen	23	06:46:27	10:16:14	
01/04/2012	(510) 774-5433	Show Detail	Eleno	Perez	26	06:32:33	09:48:57	
01/04/2012	(510) 772-8732	Show Detail	Dustin	Walker	26	06:45:16	10:09:47	
01/04/2012	(510) 385-5650	Show Detail	Claudia	Portillo	13	06:51:59	08:49:36	
01/04/2012	(510) 385-5669	Show Detail	Carla	Duvon	43			
01/04/2012	(510) 385-5752	Show Detail	Daniel	Villena	9			



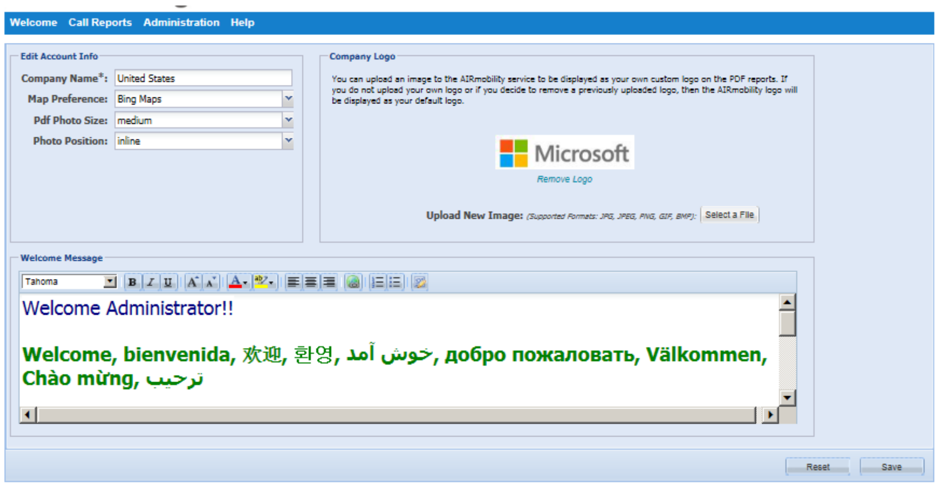
SETTINGS

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.

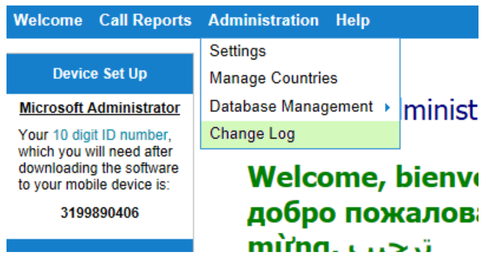


Select Save after making any edits to this page in the lower right part of this page.

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

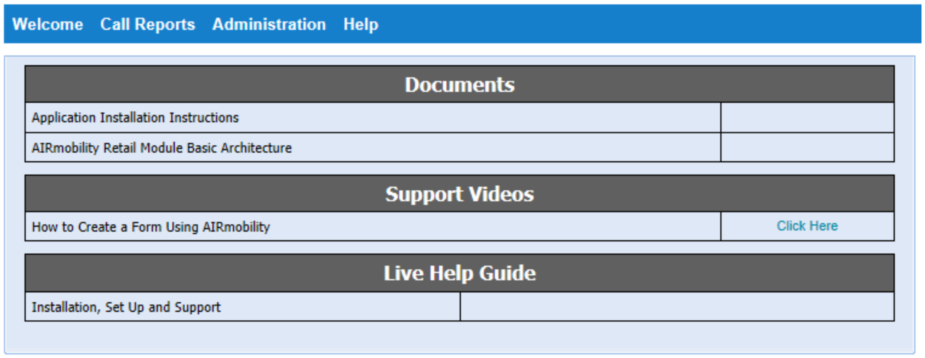
Page 1 of 1

Timestamp	Page Name	Command	Changed By	Log Detail
Mon July 1, 2013,...	Login Page		[redacted] Admin	User Login: [redacted] Admin ()
Mon July 1, 2013,...	Login Page		[redacted] Admin	User Login: [redacted] Admin ()
Mon July 1, 2013,...	Login Page		Paul Contreras	User Login: Paul Contreras (paul.contreras@[redacted].com)
Mon July 1, 2013,...	Login Page		Ana Contreras	User Login: Ana Contreras (ana.contreras@[redacted].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[redacted]com)
Mon July 1, 2013,...	Login Page		Jennifer Redfern	User Login: Jennifer Redfern (jennifer.redfern[redacted]com)
Mon July 1, 2013,...	Login Page		Allen Casey	User Login: Allen Casey (allen.casey@[redacted].com)
Mon July 1, 2013,...	Login Page		Josh Mallory	User Login: Josh Mallory (joshua.mallory@[redacted]com)
Mon July 1, 2013,...	Login Page		Jake Purcell	User Login: Jake Purcell (jake.purcell@[redacted].com)
Mon July 1, 2013,...	Login Page		Mack Bari	User Login: Mack Bari (mack.bari@[redacted].com)
Mon July 1, 2013,...	Login Page		Brent Darling	User Login: Brent Darling (brent.darling[redacted]com)
Mon July 1, 2013,...	Login Page		T.C. Woodberry	User Login: T.C. Woodberry (tc.woodberry@[redacted]com)
Mon July 1, 2013,...	Login Page		Alex Crow	User Login: Alex Crow (alex.crow@[redacted].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.



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 <u>or change</u> 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.